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ABSTRACT

This three-part package was prepared to assist business education teachers in Wyoming to improve their programs to meet the entry-level requirements of the state's employers. Three documents are included in this package: the Standards of Excellence handbook, the 1984 Report of Basic Entry-Level Competencies Needed for Employment, and a competency-based curriculum for teaching these competencies. The Standards of Excellence handbook covers the background and rationale for the standards and goals, the Wyoming business and office cluster areas curriculum, and program delivery elements, such as personnel, facilities, materials, equipment, advisory committees, support services, planning, evaluation, and budgets. Extensive appendixes cover such areas as the excellence standards program status, cooperative office education, officials in Wyoming vocational education and business education agencies and organizations, educational plans, and student profiles. The basic entry-level competencies report details a study of Wyoming businesses to determine their requirements and lists them in both narrative and table format for the use of business education teachers. The final document is a competency-based curriculum guide that suggests performance objectives and evaluations for skills in the areas of accounting; human relations; grooming/health; information processing; mailing; mathematics and calculator use; organization/time management; recording, filing, and records management; telephone skills; typing; and written and oral communication. (KC)

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THE WYOMING BUSINESS EDUCATION STANDARDS OF EXCELLENCE HANDBOOK

by
WYOMING BUSINESS EDUCATORS

Wyoming Department of Education
Lynn Simons, State Superintendent
of Public Instruction

Revised Fall, 1984

CE040434

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The State of Wyoming

Department of Education

Hathaway Building

Lynn Simons
Superintendent of Public Instruction

Cheyenne Wyoming 82002

October 12, 1984

Dear Wyoming Business Teachers:

It is with a great deal of pride that I am enclosing your copy of the Wyoming Business Education Program Standards of Excellence Handbook and accompanying competency-based curriculum.

This represents a five-year commitment by individual Wyoming business teachers, the Wyoming Business Education Association, the Wyoming Business Education Steering Committee, the University of Wyoming, and the Wyoming Department of Education. We all owe a special thank you to those businesses who responded to three separate surveys which provided information regarding their entry-level requirements expected of our business education high school graduates.

You will basically have three separate documents which should be combined. You should have received the August, 1984 Report Of Basic Entry-Level Competencies Needed for Employment. It is the most recent survey of Wyoming businesses. Dr. Lowell Barr was the project director. The Wyoming Business Education Program Standards of Excellence Handbook and the accompanying competency-based curriculum were developed as a direct result of the above survey. Your Program Standards of Excellence contains information which will be revised yearly, e.g., WBEA officers, etc. If you will just keep all of the information together in this notebook, you will have a ready resource throughout the year.

Everyone involved in the project is proud of the results. The goal of the participants was to create a document by Wyoming teachers for Wyoming students to become employed by Wyoming businesses. It is truly a unique set of documents.

I know I speak for everyone involved in the project when I wish you success. We hope you will find it to be of benefit throughout the year.

Sincerely,

Patricia J. Fairchild

Ms. Patricia J. Fairchild
Coordinator, Business Education

PJF:[illegible]

Enclosures: 2

ACKNOWLEDGEMENTS

The Wyoming Business and Office Policies and Standards Handbook is finally a reality!

Ms. Gail Modlin, sponsored by Gregg/McGraw-Hill, was instrumental in helping develop the competencies that need to be taught in the core courses. The Wyoming Business Education Steering Committee has validated these competencies three times in the past five years through state-wide surveys. We appreciate the businesses that cooperated in the surveys and the Wyoming teachers who wrote the enclosed materials to be sure our teachers were teaching what Wyoming students need to know.

WBEA (Wyoming Business Education Association) should be recognized for its involvement from the very beginning. Without its initial cooperation and encouragement, this project would not have been as comprehensive.

Ms. Pat Fairchild should be thanked for her coordination of the project. Drs. Olive Church, Lowell Barr, and James Zancanella from the University of Wyoming should be thanked for providing input and allowing the participants to develop the material we feel is most beneficial and useful for the teacher.

At this time, we would like to acknowledge all of the teachers who have helped develop this handbook.

Ken Chance
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Axel Stockhouse
Sherry Lambert

I. INTRODUCTION

A. Background

What do the following statistics mean to the Wyoming Vocational Business Education teacher?

A 20 year-old-male will work an average of 42 years!
A 20 year-old-female will work an average of 23 years!
Both will change careers an average of seven times!

It means that you must train the students to have positive work attitudes, human relations skills, decision-making and planning skills, job-getting skills, career mobility skills, and job advancement skills.

This handbook was written with these concerns in mind. It has been compiled by Wyoming Vocational Business Education teachers for Wyoming Vocational Business Education teachers.

Durla Cockley
Roberta Derr
Chris French
Sherry Lambert
Ellie Noonan

B. Vocational Education

The Wyoming State Board of Education (State Board for Vocational Education) believes that all children, youth and adults have the right to develop to their fullest capabilities. All children, youth, and adults in Wyoming need an opportunity for career-related education and employment training to develop their individual career interests and employment capabilities toward life-long productivity in our society.

As Wyoming society has become more complex, the nature and conditions of work has also become more complex. A rapidly changing economy and work place require a continual up-dating of the curriculum related to new skills and technical knowledge in order to meet individual interests and employment needs.

Thus, vocational education must operate as an integral part of the total educational system and is rooted in principles of human growth and development and career development practices. To be effective, vocational education should be a cooperative venture among the school, the private sector and the community.

We believe that the state has a two-fold responsibility:

1) to help provide individuals with the economic and industrial understanding, employability (work attitudes, human relation skills and applied basic skills) and the work competencies they need to attain economic freedom; and

2) to help provide the local communities, state and the national labor markets with a group of individuals needed for the efficient functioning of our society.

The objectives of the public education system will be, therefore, to provide:

1) the opportunities to develop employability skills (applied basic skills of reading, writing and computation, work attitude and human relation skills) required in the work setting;

2) the opportunities to understand the structure of work in the social and economic systems through awareness, orientation and exploration experiences;

3) the opportunities for employment training throughout life; and

4) the opportunities to prepare for the dual role of homemaking and wage earnings.

In order to accomplish the goals and objectives, vocational education will:

1) involve the general public and private sectors of a community in the planning, development, implementation and evaluation of vocational programs; and

2) cooperate and coordinate with other groups in the student assessment, educational and employment, placement of individuals.

Wyoming State Board of Education, January 22, 1982

C. Wyoming Vocational Business Education Philosophy

Wyoming believes that vocational business education is a school and community responsibility that provides knowledge, skills and attitudes compatible with labor market needs. It specifically relates to a student's occupational goals within a learning environment which replicates the occupational work setting. The programs are provided to all who can personally benefit from the instruction through sequentially structured activities that are built on current and changing occupational requirements.

Vocational business education is a program that has the following characteristics:

Serves all (male, female, handicapped, gifted, etc.) secondary, postsecondary, adults and nonbaccalaureate learners who need, want and can benefit from the instructional activities.

Has facilities, equipment and materials that replicate the occupational work setting.

Is taught by a vocationally certified instructor who has 2,000 hours of related work experience outside of education.

Has an active advisory committee.

Actively encourages the development of a student business organization such as Future Business Leaders of America.

Addresses a specific occupational goal and student guidance needs with a curriculum that is articulated by a scope and sequence of instructional activities. It is recommended that the program culminate with an occupational work experience such as cooperative or simulated work experience.

Has local and state evaluation involving school and community based upon defined program standards.

D. Rationale

Vocational Education--A Program for the 80's

The State Department of Education Vocational Programs Unit staff believes the following principles will govern vocational education during the decade ahead:

Vocational education is a national concern and a shared state/local responsibility.

Vocational education is an integral component of education and human resource development.

To function effectively, vocational education needs a statement policy, operational guidelines, competent certified staff and adequate resources.

Vocational education is developed, conducted and evaluated in active consultation with appropriate occupational advisory committees, employment agencies and other training programs.

Vocational education provides learning options and flexible program opportunites to meet the needs, interests and varying abilities of individuals to discover and develop their potential and make successful transitions from school to work and when retraining for employment.

Vocational education develops positive work attitudes, human relations skills, decision-making and planning skills, job-getting skills, career mobility skills and job advancement skills.

Vocational education is more effective when learning occurs in a context that simulates an actual work setting and provides all vocational students with actual work experiences.

Vocational education is accountable and is evaluated on the basis of objectives, processes, costs, community acceptance and student/employer satisfaction.

II. PROGRAM STANDARDS OF EXCELLENCE

A. Wyoming Vocational Business Education Purpose

The purpose of Wyoming's vocational business education program is to give students knowledge and experience so that they may possess the proper background and abilities to enter and advance in employment in the many fields of business education. A further purpose is to accept students on their own level and prepare them for living in society through instruction and work experiences for and about business and to give them guidance and direction in making life adjustments.

B. Goals and Definitions of Program

A major component of a vocational business education program is the curriculum. To insure the relevance of the curriculum content to the current labor market needs, the vocational educator, with the help of local advisory committee members, is to constantly review, revise and develop curriculum, where necessary, to meet the needs of the students and community. A quality business education program is achieved only as a result of good planning.

A vocational business education program is a composite of specific core and skill courses. These core courses are to be offered either by the integrated content (block) program approach or in a logical, planned scope and sequence approach. Every vocational business education department should provide a minimum of the following core courses: Introduction to Business, Typewriting, Typing II, Accounting, Shorthand/Word Processing, Business Communications and Business and Office Procedures. A detailed description of several models is provided.

The models are based on the number of vocational business teachers in the department. They are one-teacher, two- to three-teacher, four- to six-teacher and seven (and over) teacher departments. Each model includes the recommended course for the four cluster areas: Specialized Office, General Office, Bookkeeper/Accountant and Computer and related areas.

Also included is a list of recommended elective vocational courses that should be used if scheduling, teacher assignments and classroom facilities allow. The inclusion of these classes will enable the students to specialize in their career choices.

Using the four cluster areas, it is recommended that students submit a written individual employment plan where and when appropriate which outlines the student's career objectives. After the career objectives have been determined, learning plans should be developed so that students, teachers, counselors, etc., know what the students need in order to meet his/her objectives. A student progress record should be kept on each student to assure they are following their learning plan and hereby reaching their career objective.

Samples of written career objectives, learning plans and student progress reports are in Appendices K and L.

C. 1. Curriculum: Wyoming Business Education Cluster Areas

Specialized Occupations--Information; Stenography; Secretary;
Office Administration

This program would prepare the student to face the changing trends in business that demand increased decision-making, management, composition and proofreading skills. It must also prepare students to function effectively in varied office settings. This program area includes shorthand and/or word processing skills. Job titles in this program area include secretary, stenographer, administrative clerk, word processing correspondence secretary, word processing administrative secretary.

General Occupations--General Clerical

This program would prepare the student to meet the increased demand for office workers with traditional and new skills demanded by the credit-card age facilities within banks for payment of bills and interlocking of telephone with computer terminals for banking and credit transactions to name a few. Examples of positions in this program area include typist, transcribing machine operator, file clerk, various machine operators, mail clerk, time clerk and receptionist.

Bookkeeping/Accounting Occupations--Accounting Occupations

This program would prepare the student to meet the needs of basic entry-level skills required in the bookkeeeping/accounting occupations. It would also prepare the student to meet the increased demand for decision-making and financial management skills. Job titles in this program area include bookkeeper, bookkeeping machine operator, invoice control clerk, audit clerk, accounting clerk.

Data Processing/Computer and Related Occupations--Data Processing

This program would prepare the student to meet the needs of basic entry-level skills in Computer Science Occupations. It would also prepare the student to meet the increased demands for decision-making and programming skills. Job titles in this program area include programmer trainee, key-entry operator, tape librarian, computer operator assistant, computer operator.

Models

Before students can make an educated choice of a career, career exploration units or courses should be included in the curriculum.

It is recommended that Introduction to Business Industry be taught as a component or mini unit at the 7th or 8th grade level. An Introduction to Business should be taught at the 9th grade level as an exploration class.

RECOMMENDED CAREER ORIENTED CLUSTERS

One-Teacher Business Department

Grade	Specialized	General	Accounting	Data Processing/Computer
*7	Business Exploration (Mini Unit) Keyboarding (Mini Unit)	Business Exploration (Mini Unit) Keyboarding (Mini Unit)	Business Exploration (Mini Unit) Keyboarding (Mini Unit)	Business Exploration (Mini Unit) Keyboarding (Mini Unit)
*8	Business Exploration (Mini Unit) Keyboarding (Mini Unit)	Business Exploration (Mini Unit) Keyboarding (Mini Unit)	Business Exploration (Mini Unit) Keyboarding (Mini Unit)	Business Exploration (Mini Unit) Keyboarding (Mini Unit)
*9	Typewriting Intro to Business (1 year)	Typewriting Intro to Business (1 year)	Typewriting Intro to Business (1 year)	Typewriting Intro to Business (1 year)
10	Intro to Computers	Intro to Computers	Intro to Computers	Intro to Computers
11	Accounting Word Processing **Business Communications	Accounting Word Processing Business Communications	Accounting Business Comnmunications	Accounting Business Communications
12	[ooo]Business Procedures	[ooo]Business Procedures	[ooo]Business Procedures	Business Procedures Adv. Data Processing

[ooo]Include Small Business Owners Management Unit in this block.

*Business Exploration may be taken at the 7th or 8th grade level as a mini unit.

An Introduction to Business should be taught at the 9th grade level.

**Recommend that Shorthand, Word Processing/Machine Transcription, and Business Communications be alternated. If school has a seven-period day, it is recommended that Business and Office Procedures be a two-hour block.
Note: If time or personnel is available, it is recommended that courses from the next model be taught before selecting a course from the list of electives.

ATTENTION: Based upon the August, 1984, Report of Basic Entry Level Competencies Needed for Employment, the following units should be included in the Business Procedures class:

- Recording, Filing, Records Management
- Mailing Skills
- Telephone Skills
- Math and Calculator Skills
- Human Relations
- Organization/Time Management Skills
- Grooming Skills, Health Skills
- Written/Oral Communication Skills
- Reprographics (Optional, low percentage needed)

Two or Three-Teacher Business Department

Grade	Specialized	General	Accounting	Data Processing/Computer
*7	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding
*8	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding
*9	Introduction to Business Typewriting	Introduction to Business Typewriting	Introduction to Business Typewriting	Introduction to Business Typewriting
10	Introduction to Computers **Business Communications	Introduction to Computers Business Communications	Introduction to Computers	Introduction to Computers
11	Accounting Word Processing Shorthand	Accounting Word Processing	Accounting Business Communications	Accounting Business Communications Data Processing
12	Business Procedures[o] (2-hour block)	Business Procedures (2-hour block)	Business Procedures[oo] (2-hour block)	Business Procedures[ooo] (2-hour block)

*Business Exploration may be taken at the 7th or 8th grad level as a mini unit.

An Introduction to Business should be taught at the 9th grade level.

**Recommend that Shorthand, Word Processing/Machine Transcription, and Business Communications be alternated.

If school has a seven-day period day, it is recommended that Business and Office Procedures be a 2-hour block.

Note: If time or personnel is available, it is recommended that courses from the next model be taught before selecting a course from the list of electives.

[o] Include Advanced Shorthand or Machine Transcription in this block.
[oo] Include Accounting II in this block.
[ooo] Include Advanced Data Processing in this block.

ATTENTION: Based upon the August, 1984, Report of Basic Entry Level Competencies Needed for Employment, the following units should be included in the Business Procedures class:

- Recording, Filing, Records Management
- Mailing Skills
- Telephone Skills
- Math and Calculator Skills
- Human Relations
- Organization/Time Management Skills
- Grooming Skills, Health Skills
- Written/Oral Communication Skills
- Reprographics (Optional, low percentage needed)

Four- to Six-Teacher Business Department

Grade	Specialized	General	Accounting	Data Processing/Computers
*7	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding
*8	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding
*9	Typewriting Introduction to Business	Typewriting Introduction to Business	Typewriting Introduction to Business	Typewriting Introduction to Business
10	Introduction to Computers **Business Communications Word Processing	Introduction to Computers Business Communications Word Processing	Introduction to Computers Business Math Business Communications	Introduction to Computers Business Math Business Communications
11	Accounting I Business Procedures (1 hour) Shorthand **Business Communications	Accounting I Business Procedures (1 hour) Business Communications	Accounting I Business Procedures (1 hour) Business Communications	Accounting I Business Procedures (1 hour) Data Processing Business Communications
12	Co-op (3 hours) Data Processing ***Shorthand II	Co-op (3 hours) Data Processing	Co-op (3 hours) Data Processing ***Accounting II	Co-op (3 hours) Advanced Data Processing Accounting I

*Business Exploration may be taken at the 7th or 8th grade level as a mini unit.

An Introduction to Business should be taught at the 9th grade level.

**Recommend that Shorthand, Word Processing/Machine Transcription, and Business Communications be alternated.

***If possible students should be encouraged to take these courses.

If school has a 7-day period day, it is recommended that Business and Office Procedures be a 2-hour block.

Note: If time or personnel is available, it is recommended that courses from the next model be taught before selecting a course from the list of electives.

ATTENTION: Based upon the August, 1984, Report of Basic Entry Level Competencies Needed for Employment, the following units should be included in the Business Procedures class:

- Recording, Filing, Records Management
- Mailing Skills
- Telephone Skills
- Math and Calculator Skills
- Human Relations
- Organization/Time Management Skills
- Grooming Skills, Health Skills
- Written/Oral Communication Skills
- Reprographics (Optional, low percentage needed)

Seven (or more) Teacher Business Department

Grade	Specialized	General	Accounting	Data Processing/Computer
*7	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding
*8	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding	Business Exploration Keyboarding
*9	Typewriting Introduction to Business	Typewriting Introduction to Business	Typewriting Introduction to Business	Typewriting Introduction to Business
10	Word Processing **Business Communications Introduction to Computers	Word Processing Business Communications Introduction to Computers	Business Math Business Communications Introduction to Computers	Business Math Business Communications Introduction to Computers
11	Accounting I Business Procedures (1 hour) Shorthand	Accounting I Business Procedures (1 hour)	Accounting I Business Procedures (1 hour) Business Communications	Accounting I Business Procedures (1 hour) Business Communications
12	Co-op (3 hour) Shorthand II Data Processing Business Law Entrepreneurship	Co-op (3 hour) Data Processing Business Law Entrepreneurship	Co-op (3 hour) Data Processing Accounting II Business Law Entrepreneurship	Co-op (3 hour) Data Processing Accounting I Business Law Entrepreneurship

RECOMMENDED ELECTIVE VOCATIONAL COURSES:

Typing II Alphabetic Shorthand Economics Machine Shorthand/Stenoscript Recordkeeping Business Machines Business Career Education Investments Banking and Investments and Insurance	Alphabetic Shorthand	Economics

* Business Exploration may be taken at the 7th or 8th grade level as a mini unit.

An Introduction to Business should be taught at the 9th grade level.

** Recommend that Shorthand, Word Processing/Machine Transcription, and Business Communications be alternated.

If school has a seven-period day, it is recommended that Business and Office Procedures be a 2-hour block.

Note: If time or personnel is availabe, it is recommended that courses from the next model be taught before selecting a course from the list of electives.

ATTENTION: Based upon the August, 1984, Report of Basic Entry Level Competencies Needed for Employment, the following units should be included in the Business Procedures class:

- Recording, Filing, Records Management
- Mailing Skills
- Telephone Skills
- Math and Calculator Skills
- Human Relations
- Organization/Time Management Skills
- Grooming Skills, Health Skills
- Written/Oral Communication Skills
- Reprographics (Optional, low percentage needed)

Students should be informed about the many employment opportunities, advancement possibilities, career options and the principles of business. This information will allow the students to develop a career plan, thereby maximizing human resource development.

C. 2. Course Objectives - To be developed.

3. Course Descriptions

Introduction to Business (one year) focuses on today's important business and economic concerns to help students become effective consumers, workers and citizens in our free enterprise system. It will aid students to comprehend and appreciate our business system and the economic setting in which it functions. Career exploration, selection and development should be stressed.

Business Career Education (one semester) courses are designed to help students explore the various occupational clusters found in the world of business; expose the students to the traits, skills, training, education, conditions, etc., needed to succeed in each of the clusters and in many of the specific jobs; and to help students discover things they dislike as well as things they like about certain jobs within each cluster. Hands-on and out-of-school activities and community resources may be used to make these studies interesting and to provide appropriate "exploratory" situations.

Typewriting (one year) is designed to help the student continue to develop touch typing, proper technique, speed/control development, explore career opportunities in the business field and to motivate students to plan for further business training. Students learn to tabulate paragraph material, learn to type short exercises using vertical and horizontal centering and develop a familiarity with machine parts. Students are instructed the correct form for typing letters, reports, business forms and tabulation exercises.

Typing II (one year) challenges students to reach their full typing potential in preparation for their chosen vocation. Areas of concentration will include development of proper work attitudes and efficient work habits; speed and accuracy; various types and proper forms of business communication; technical, legal and medical typing; timed production; and multiple reproduction techniques.

Business Communications (one year) is designed to help students develop specific competencies in verbal and written communications. Students will learn how communication skills of listening, speaking, reading, writing and proofreading are related to effective job performance. This course could include the following areas: telephone techniques, listening skills, job interviewing, punctuation and grammar, sentence and paragraph structure, spelling and letter composition. Students are given the opportunity to use communication skills through the composition of various business letters and reports.

Business Math (one year). Business employees are required to assemble, manipulate and interpret numerical data. Office trainees need fundamental skills in business mathematics. Areas of instruction should include:

1. Fractions, decimals
2. Interest, percentages, notes
3. Installment buying, insurance
4. Depreciation
5. Mark-up, mark-down
6. Payroll, taxes
7. Sales slips, invoices
8. Balance checking accounts

The use of a calculator is not recommended until basic functions are mastered.

Word Processing (one year) is transforming written, verbal, or recorded ideas into high quality printed form using maximum efficiency with minimum time and cost. Students will develop proficiency in word processing skills by using a transcribing machine, power typewriter, microcomputer and/or word processing equipment. Students will study areas such as various documents, office procedures, business terms, business vocabulary, basic grammar and proofreading. Students will be acquainted with word processing concepts, skill requirements for entry-level positions, word processing environment and the laddering concept.

Shorthand I (one year) is designed for the student planning on a stenographic or secretarial career. The student will learn to read, write and transcribe shorthand outlines. The student will also learn the principles and applications of punctuation, spelling, vocabulary building and grammar.

Shorthand II (one semester or one year) is designed for the student who wishes to procure employment upon graduation. Emphasis is placed on refinement of all the techniques employed in Shorthand I. Special consideration is given to rapid dictation, accurate transcription and proper grammar usage.

Accounting I (one year) is a course for understanding basic accounting principles and procedures. Students apply the fundamentals of accounting and how to handle daily recording and financial activities of typical small- or medium-sized businesses. This course includes analyzing financial records, accounting systems and procedures. It also covers special accounting procedures and introduces business data processing fundamentals.

Accounting II (one semester or one year) as course could cover the following topics:

Review of Basic Accounting Procedures
Departmental and Payroll Accounting

Updating Accounts by Adjustments
Partnership Accounting
Accounting Control Systems
Accounting for Taxes, Notes and Drafts
Corporation Accounting
Automated Accounting Systems
Cost Accounting
Special Problems in Accounting for Sales
Management Use of Accounting Data

Areas to be covered would vary depending on the length of course. Computerized Accounting should be emphasized throughout the course.

Introduction to Computers (one year) is designed to provide an introduction to computers and data processing for business students so that they are able to understand how computers operate and how they are used in all aspects of business. The student will become familiar with data processing terminology, the data processing cycle, basic operations, data processing systems and procedures, and programming. The student will develop an understanding of data processing/computer science and the various devices, equipment and media used in each method. The student will understand the typical business applications of the computer. If equipment is available, a second semester would concentrate on hands-on application along with computer applications and programming.

Business Law (one semester) is designed for 11th and 12th grade students. An understanding of Business Law is regarded as necessary for students if they are to understand the relationships between people; between people and business; and between people and government. The study of Business Law will enhance the growth of the student as an employee or in any other role he/she assumes.

Business Procedures (one year) will be a one-hour class at the Junior level if Co-op is offered. If Co-op is not offered, it should be a two-hour block at the Senior level. The two-hour block program is designed as a capstone for schools without Co-op. Emphasis is placed on learning units as well as an actual model office simulation. Students will display their capabilities to obtain and retain employment. The number of units to be studied and the time for training in each unit prior to the model office will be determined by individual student needs, capabilities and specific job tasks. The following units should be included:

Recording, Filing, Records Management
Math and Calculation Skills
Mailing Skills
Telephone Skills
Travel Arrangements
Human Relations, Business Attitudes and Behavior
Written/Oral Communication Skills
Grooming Skills/Health Skills
Simulated Model Office

Organization/Time Management
Reprographics (this does not include school annual or newspaper) - optional

A simulated model office unit should be taught in a room that closely resembles a business office. True work experience simulation must allow for the flow of work from one station to another. Therefore, practice sets in themselves are not sufficient. Students and instructors should develop a learning plan that includes the competencies and experiences the student will be acquiring by working in a simulated office situation. The students files should include a record of these competencies. An important component of a simulation is individualized instruction; therefore, adequate equipment and materials are essential.

Business Exploration is a mini course offered at the junior high level to introduce students to high school classes in business education necessary for entry-level employment in the business industry. It is suggested that it should be back to back with keyboarding.

Keyboarding is a mini unit or one semester course, designed to teach the student the touch method of using the keyboard. This would include top row number keys and symbols as well as a 10-key numeric pad.

Data Processing (one year) is a concentrated study of business applications and business programming languages. The business applications would include word processing, data base files, spreadsheets, business graphics, telecommunications and networking. The languages might include advanced BASIC, PASCAL, COBOL, RPG, or other programming languages related to business.

Advanced Data Processing. This course could be incorporated into a three-hour Co-op program with an emphasis of training in a Business Data Processing Department within the community. If this exposure is not possible, an advanced Data Processing class could do inhouse tasks of programming, computer librarian, networking specialist, student tutor, teacher assistant for computer projects, etc.

4. Learner Outcomes

The student will have the opportunity of determining the program in which he or she wishes to participate. By utilizing competency-based instruction with a sequence of classes, the student will have been given the opportunity of learning the entry-level skills expected by Wyoming employers as a high school graduate applying for that specific job.

5 Capstone Experience

Cooperative Office Education (one year) is designed to provide students with an understanding of business, to show the importance of the flow of work in a business and to tie all previous learning into a real practical experience. COE is the ideal capstone course. A comprehensive training agreement must be utilized. This agreement must be signed by the employer, the student, the parent and the instructor. A formal training plan should be cooperatively developed by the instructor, learner, and employer. Students will be employed in supervised business education training stations that are related to their career objective and are provided a related class or seminar designed to upgrade trainees and to reinforce job skills. Students must be employed in accordance with the Minimum Wage and Hour Laws. Cooperative work experience students must be employed at a training station an average of 15 hours per week. Students will be given school credit for successful completion of supervised work experience.

If COE is impossible, other options would include Community Resource Training (CRT) and Experience Based Career Education (EBCE) or Simulated Office Experience.

For additional information about a COE program, read the Cooperative Office Education section.

Alphabetic Shorthand (one year) is a personal use system with integrated instruction in how to take notes. Its objective is not to train senographers but to assist students to read and learn more intellectually by taking notes for future use.

Economics (one year) Topics to be learned relate directly to: our economic system; production of goods and services; price determination; distribution of national income; money, credit and banking; national income--growth and stability; government and taxation; and international economic systems and current problems.

Machine Shorthand/Stenoscript (one year) is an alphabetic system of shorthand written on a shorthand machine. The student learns the theory of the system, transcription, and reading of their shorthand. Punctuation and spelling is stressed. Students are made aware of the career opportunities in business and admission requirements to schools for court reporting.

Record Keeping (one year) is a course that proceeds from very simple clerical tasks to the introduction of double-entry bookkeeping concepts. Business papers and forms will provide development of skills and knowledge that students can use in simple office jobs in which record keeping is involved. Computerized data entry skills should be introduced if possible.

Business/Office Machines (one semester) course. The touch method of using 10-key calculating machines is used to develop speed and accuracy in working business math-type problems. A practice set may be used. Any other business/office machines which are available may be used.

Entrepreneurship/Small Business Management (one semester). A course designed for students who are interested in or who are investigating the possibility of becoming small business owners or working in management or administrative positions. The course will involve an overview of the characteristics, the procedures, operations and organization of the small business.

6. Instructional Delivery

As the program of study should focus on the needs of each individual, so should the method of instruction be varied and suitable for the needs of the student. The strategies used in teaching each course depend to a certain extent on the structure of the course and the content, but the following list identifies possible delivery methods suitable for different areas of business education classes:

a. traditional lecture
b. textbook
c. worksheet
d. small-group discussion
e. audio-visual presentation (film, video-tape, audio-tape, film strip, slide-tape, etc.
f. microcomputers, terminals, word processors
g. research projects and papers
h. independent packet
i. field trip
j. totally or partially individualized programs (possibly contract)
k. business worker observation (1-week maximum; 2- or 3-day, ideal)
l. simulation
m. cooperative education
n. student worker assigned to teacher
o. guest speaker
p. panel discussion (guest or student)
q. community survey on business attitudes and methods
r. games

In keeping with the philosophy of competency-based objectives, it is suggested that the business tasks be presented as competency-based modules.

7. Leadership Activities

Student Organization

Students respond to a business and office curriculum that is relevant. One way of achieving this is through becoming involved in a student organization for business students. These organizations offer practical experience, friendly competition and active participation in projects and activities.

Future Business Leaders of America-Phi Beta Lambda, Inc. is a student-centered organization whose program of leadership and development is designed specifically for secondary and postsecondary students enrolled in vocational business education programs. In Wyoming this student organization is under the supervision of the State Business Education Coordinator. It is a nonprofit, nonpolitical student organization.

One of the chief objectives of Future Business Leaders of America (FBLA) for secondary students and Phi Beta Lambda (PBL) for postsecondary students is to develop strong, aggressive leadership abilities so that future businessmen and women may participate more effectively in the business and community life of which they are a part. Also, FBLA and PBL: (1) provide each member the opportunity to participate in group activities and to compete with others who have similar interests and career objectives; (2) offer rewards for full participation in the total business education program; (3) afford the opportunity for recognition of a member's progress, achievement and leadership development; (4) insure the opportunity to build the status of the business program in the school; and (5) provide the opportunity for group service to the community.

The opportunity should be provided for membership in State and National FBLA for those students wishing to affiliate and participate in competitive events on the state and national levels. FBLA is not only extra-curricular but may also be an intregal part of the program. It is a great motivator for the classroom as well as encourages student responsibility, developing leadership abilities and strengthening rapport between teacher and student. In order for an FBLA student organization to be really effective, it must have the full support of all the business faculty and administration.

The Wyoming FBLA Advisors' Handbook contains information on state conferences. It is reviewed and updated each summer by the advisors and a copy is provided to each active local chapter. It is available by contacting the Business Education Coordinator.

III. PROGRAM DELIVERY ELEMENTS

A. Personnel

1. Certification Requirements

The following are suggested requirements for all vocational business education teachers employed in approved vocational programs in the State of Wyoming:

a. Maintain a current Wyoming teaching certificate as well as a vocational credential which requires 2,000 hours of related work experience.

b. A teacher is currently required only to present evidence of participation in one or more professional growth experiences for a total of five (5) semester hours or five (5) hours of State Department of Education approved programs. It is recommended that the business education teacher should work in an office a minimum of 250 hours every five years to keep abreast of current office procedures or complete five credit hours related to business through workshops, tours, conferences or some equivalent.

1. Create and maintain a good teaching/learning environment.
2. Establish rapport with co-workers, students and community.
3. Become actively involved in professional organizations as well as business and civic organizations.
4. Be informed about policies and activities of the state and local government.
5. Show a definite commitment to vocational education.
6. Submit the program status report to the State coordinator and school personnel by May 1.
7. Contact the State Coordinator for the needed curriculum materials and/or inservice. Furnish the coordinator with your ideas for inservice topics and workshop needs.

Local Administration

Due to the many varying policies, it is recommended you refer to local policies and procedures handbooks in regard to any questions in this area.

2. Support Staff Guidelines

The following support personnel are available for teachers: state department, university, community colleges, master teachers, consultants, exhibitors, steering committee, advisory councils and teacher educators. Teachers should also have available at the local level: teacher aides, secretaries, media resource people and library assistance.

A complete list of State Department personnel, WVA officers, WBEA officers and various other personnel is included in the appendix of this handbook.

3. Staff Development

Many opportunities for self-improvement and development are provided. Teachers are encouraged to attend all conferences to keep current with trend changes. Some of the conferences that might be attended are: WBEA Fall Conference, WVA Spring Conference, district conferences sponsored by major publishing companies, speciality workshops by vendors, summer workshops, youth group conferences, M-PBEA, NBEA, AVA and the AVA Region V conference.

On the local level school development plans, as well as individual development plans should be designed to aid professional growth. These plans could be implemented through inservice and attendance at conferences or workshops. Professional leave or release time should be granted to allow teachers to visit schools and businesses to enable them to maintain a quality program.

B. Facilities

1. Space Requirements

The number of classrooms needed will depend upon school enrollment and the number/variety of programs offered. To provide a cohesive department, all rooms should be located near each other. At least one classroom should reflect a simulated office atmosphere. It is important that a private office, with telephone, be available for student and instructor consultations.

The size of the classrooms will be determined by the type of activity taking place. A minimum of 25 square feet per student in a laboratory situation and 12 square feet per student in a classroom-type activity is recommended. Additional area must be provided for aisles and storage. Classrooms should contain a minimum of 1200 square feet for a class enrollment of 20. At no time is the student enrollment to exceed the number of training stations. Adequate storage and security must be provided for equipment and supplies. A facility for student clean up (sink) should be provided.

2. Safety Requirements

Heating, lighting, ventilation, electrical work and sound control must meet safety requirements.

3. Replacement plan

New or renovated building plans should contain teacher input as to business department needs. Rooms should have acoustical ceilings and should be consistent with energy efficient modes and allow for audio-visual presentations.

4. Equal Access

Provisions for the needs of the physically disadvantaged must be made. Special considerations should be given as to parking, stairways, walkways, ramps, entrances, corridors, elevators, restroom facilities, drinking fountains and telephones as it pertains to individual rights under federal law.

C. Equipment

The instruction program in business education requires a wide variety of office equipment, including electric typewriters, automatic typewriters and machine transcribers. Labor market trends and research studies indicate the competencies required on such equipment. While modern office equipment is costly, schools must accept the responsibility for providing equipment which gives realistic learning experiences to students.

a. Space Requirements

Desk area should be adequate to accommodate electronic typewriters and computers. The work area must be adequate to operate the equipment properly.

2. Safety Requirements

Students should be advised as to hazards involved in machine operation and safety procedures should be posted. Special attention should be given to safe use of extension cords. A master electrical shutoff should be provided. All fire regulations should be followed.

3. Replacement Plan

A five-year equipment replacement plan for the business and office department assures good budgetary planning, quality equipment and relevance of equipment with the business community. Maintenance contracts should be available for all major equipment in the business department.

Selection of equipment should be determined by:

a. Relevance to business community;
b. Availability of adequate service;

c. Manufacturer's instructional materials;
d. Life span relative to cost.

For a complete list of equipment to establish a program or maintain a program see handbook section for Program Delivery Elements (J) Budget on page 27.

4. Equal Access

Special consideration should be given to provide for the special needs of the students--for example adjustable chairs and desks.

D. Materials

Business education programs are to be supplemented by instructional materials and supplies which provide the student with current materials and "hands on" experiences. Sufficient materials and supplies are to be provided to meet the individual needs of each student.

1. Type of Materials Required

Reference materials and periodicals applicable to the business education service are to be made available for ready access by the vocational students in the classroom. These reference materials and periodicals should be included within the regular curriculum.

2. Replacement Plan

The recommended replacement of textbooks should be every five years except in areas of fast changing technology such as data processing and word processing. Two to three years may be more appropriate in these areas. It is recommended that supplemental materials and periodicals accompany textbooks to enhance application of concepts and principles. These may need to be replaced yearly.

E. Local Advisory Committee

The purpose of an advisory council is to advise vocational business educators in establishing and operating a vocational business education program which will serve the needs of the student and of business and industry. The committee should suggest curriculum changes and provide effective communication between the community and school.

1. Role

The responsibility of an advisory council is to offer advice for a program but the members have neither legislative nor administrative authority. An advisory council is not intended to usurp the functions of boards of education or of administrative staffs.

The numbers of members on a council is left to the discretion of the local district. The council elects its own officers and establishes its own policies, procedures and projects. The members of the advisory council should be people whose combined experience and abilities represent a cross section of labor and industry or an occupational area which might include employees and employers, minorities, supervisors, management, parents, alumni and students.

Advisory council members should possess these qualifications.

a. Experience and enthusiasm. Members must have had recent, successful, first-hand, practical experience in the committee's area of concern and have shown substantial interest in the business education program. They should be recognized by their associates as competent, successful people.

b. Character. Members should be people of intelligence and integrity. They should be responsible, civic-minded and cooperative.

c. Available time. Members should be available for meetings and prepare to meet whenever necessary.

The following activities are suggested for an active advisory committee:

a. Plan and conduct community needs surveys and research studies.

b. Keep educators informed of new technical developments which require changes in curriculum.

c. Counsel and guide students in matters concerning the "world of work."

d. Develop a good public relations program.

e. Review and evaluate the program annually.

f. Establish standards for selecting equipment and instructional material.

g. Secure donations of equipment and supplies.

h. Assist in youth organization activities.

i. Obtain job opportunities for graduates.

j. Obtain support for state and national legislation which will benefit vocational education.

2. Meeting Requirements

For effective utilization of an advisory council, a minimum of two meetings should be held annually. Also, all minutes of these meetings should be kept on file.

F. Support Services

1. Vocational Guidance

Vocational guidance services should be provided to offer students an opportunity to become acquainted with business occupations as they relate to the world of work at the entry-level position.

2. Job Development and Placement

Job development and placement provides for a working relationship with the business/industrial/agricultural community by identifying and/or developing employment opportunities for students who successfully complete business education programs and assist the business student and the employing community to satisfactorily fill the available jobs (part-time and full-time) and to also assist the cooperative business education coordinator in recruiiting business education students.

3. Follow Up

The teacher has a responsibility to follow up graduates of the business education vocational program, to analyze job-entry level needs of the students and to see if they were adequately met by the most critical evaluator in the community--the employer. The teacher should work closely with the guidance personnel to conduct the follow-up study.

4. Student Assessment, Identification Services

The teacher should work closely with guidance and the special services personnel in developing Individualized Vocational Education Plans (IVEP) for special needs students. Specific competencies must be listed on the IVEP. The teacher should seek and obtain specialized resources (material and/or human) for any of the 11 handicapping conditions.

Upon referral, the teacher should work together with the guidance services and the student evaluation services personnel for student assessment. When the student's needs have been assessed, arrangements should be made for the following help: learning disabilities, speech and hearing, tutorial, special project, physically handicapped, visually handicapped, gifted and/or talented.

5. Remedial Services

The teacher should work together with the guidance services for remedial purposes to include tutorial, learning disability services, special projects and other learning difficulties.

6. Career Information and Counseling Services

A well-developed guidance and counseling program is essential to the success of the program. This is particularly true for the middle grades--7, 8 and 9.

The teacher and guidance personnel should work together to provide individual students with occupation information to allow the student to choose and develop a career. After the student has made a career selection, the teacher and counselor should develop a learning plan to enable the student to reach his/her career objective.

It is essential for the student to be given the opportunity to learn about the many career choices and be provided with counseling to assist in obtaining the education needed for a career choice. The teacher and counselor are the key elements.

7. Outreach Services

The teacher should work closely with the guidance personnel for outreach services to include homebound students, mental health crisis centers, vocational rehabilitation, job service, children's homes, adult education, etc. Outreach service includes any service outside the school system.

G. Planning

1. Annual Plans

Constant evaulation and planning is an integral part of a good business program. The following items are those which should be addressed by the business education department each year (or sometime during a three-year period, depending on the needs brought out by nation-wide research or local needs).

a. Complete program self study (see the appendix)
b. Make sure scheduling is appropriate
c. Prepare two-year plans
d. Plan to attend at least one professional meeting

2. Five-Year Plans

Long-range plans should be disseminated to administrators and kept on permanent file in the case of resignation or termination of a teacher. The following are items that should be part of long-range planning.

a. Community needs assessment
b. Evaluation of the curriculum on the basis of current nation-wide statistics, local conditions, advisory council input, and state handbook recommendations for business education
c. Evaluate program objectives and redefine career areas
d. Project staff, facility and equipment needs
e. Plan for implementation of curriculum changes indicated in needs assessment

H. Evaluation

1. Self-Study

The program self-study will be completed annually and submitted to the State Coordinator by May 1. The results will be compiled and disseminated in the fall. All information will be strictly confidential. The necessary form is included in the appendix.

2. Comprehensive Program Review

The plan for self-evaluation is an essential component of any vocational business program. The evaluation should be ongoing and well planned. All vocational business teachers should prepare a program evaluation packet that includes the following:

a. Local program self-study (as performed by the teacher(s))
b. State supervisory visit report (if applicable)
c. North-Central Evaluation (if applicable)
d. Administrator and advisory committee program self-study (if it is administered)
e. Follow-up study

This self-study should show the changes incorporated into the program as a result of these ongoing evaluations. The advantage of using an evaluation packet as described above is that all evaluations are together so any outstanding concern can be realized immediately and acted upon.

3. Needs Assessment

The school should be evaluated on the basis of how successfully it is meeting the needs of the students in terms of philosophy, program, objectives and priorities.

Faculty members, parents and students should all become actively involved in these assessments. It is important that these groups understand that the purpose of these assessments is to improve the quality of the school's program through an evaluation.

The community needs will continually be assessed and reassessed through the validation and revalidation process. Curriculum changes and adjustments will be made based on the information obtained through validation.

I. Supervision

Good supervision of the business program is essential to the development of a sound curriculum, effective teacher methods and proper standards.

The local structure of supervision may include other teachers, department heads, assistant principals, principals, directors of vocational education, superintendents and boards of education. The state supervisory structure includes the teacher, the business education coordinator, the director of the vocational unit and the state superintendent of public instruction. The business education coordinator should be responsible for the program administration and review from the Introduction to Business course through the Cooperative Work Experience.

J. Budget

To provide a quality program, a relevant curriculum and adequate funding are the essential elements. The following information lists the needs and costs to be considered in the budgeting process. Due to the change in costs, dollar amounts have not been assigned. Consult your local suppliers and vendors to attach a dollar amount to the budget.

1. Program equipment according to number of teachers in department.

	Size of Business Department			
Equipment Item	1	2-3	4-6	7+
Electronic/Electric Typewriters	10-25	25-50	51-75	75+
Calculators	5-10	6-15	16-20	20+
Dictating/Transcribing Machines	1-3	4-6	7-9	10+
Automatic Text-Editing Equipment (Memory, Mag Card, Display Writer, Mini/Micro Computer/Word Processing Programs and Equipment)	1-2	2-3	3-5	5+
Micro/Mini Computer	1-2	2-3	3-5	5+
L-Shaped Desks	5-15	15-25	25-35	35+
Secretarial Posture Chairs	10-25	25-50	51-75	75+
Adjustable Typist Desks	5-15	15-25	25-35	35+
Stop Watch	2	2-3	4-6	7+
Interval Timer	2	3	4	4+
Electric Collating Equipment	1	1	1	1
Folding Machine	1	1	1	1
Shorthand Lab Equipment	1	1	1	1
Adjustable Demonstration Stand	1-2	3	4	5+
Mimeoscope	1	1	1	1
Filing Cabinet (laterial with locks)	1-2	3-4	5-7	7+
Telephone	4	4	4	4
Tape Recorder	2	2-3	4-6	7+
Overhead Projector/AV Cart	1	2-3	4-6	7+
Record Player	1	1	1	1
Film Projector/Slide Projector	1	1	1	1
Opaque Projector	1	1	1	1
Speed Reader	1	1	1	1
Teacher Desk (with lock)	1-2	2-3	4-6	7+
Adjustable Teacher Chair	1-2	2-3	4-6	7+
Bookcase	1-2	3	4	5+
Locking Storage Cabinet	1-2	3	4	5+
Student Storage Cabinet	1-2	3	4	5+
Rectangular Tables				
Acoustics				

2. Other Items

Textbooks for all courses
Workbooks for texts as needed
Standardized tests for texts
Practice sets as needed
Reference books/dictionaries
Telephone books
Travel (professional, student organization, etc.)
Service contracts on equipment
ZIP Code books
Film rental and AV materials
Art typing books

3. Variable Expenses Program

Teacher salaries
Administrative costs
Custodial and classified staff costs
Maintenance costs
Overhead costs
Grounds maintenance costs
Transportation

4. Suggested Supplies

Carbon paper
Mimeograph paper, white and colored
Copying machine paper
Adding machine tape
Adding machine ribbons
Typewriter ribbons
Typewriter correcting tape
Correcting supplies, erasers
Staples
Masters, colored
Stencils
File folders, hanging folders
Index cards
Index guides
Manila envelopes
Envelopes
Onion skin paper
Second sheets
Expandable files
File folder labels
Note pads
Masking tape
Scotch tape
Chalk
Pins
Tacks
Tissues
Speed charts
Certificate of award
Flash cards
Embossing tape for label makers
Poster board
Stamp pad ink
AV pens
Daily memo book
Lesson plan books
Grade books
Calendars, refills
AV supplies
Awards, pins, charm
Paper towels
Lab coat
Razor blades
Desk cleaner
Mag disks, cards, tapes
Continuous paper
80-column punch card
Computer software programs
  1. Accounting
  2. Word processing/text editing
  3. Computer-assisted educa-

cational programs (typing, math, English, management, real estate, etc.)

- Rubber bands
- Paper clips
- Glue/paste
- Magic markers
- Hand cleaner
- Construction paper
- Duplicator fluid
- Mimeograph ink, black and colored
- Type cleaner
- Pens, pencils
- Thermal spirit masters
- Transparencies
- Fasteners
- Rubber Cement
- Duplicator paper, white and colored
- Rubber stamps
- Index card file box
- Styli
- Shading plates
- Dial-a-grade
- Carousels
- Staplers
- Tapes
- Wall charts
- Book ends
- Label maker
- Selectric element/daisy wheel
- Yarkstick/meter stick
- Rulers
- Staple remover
- Dater
- Scissors
- Stamp pad
- Blackboard pointer
- Paper punch/3-hole punch
- Lettering guides
- Sten-o-grader
- Postage scale
- Steno Notebook

5. Suggested periodicals

TODAY'S SECRETARY
Gregg/McGraw-Hill
1221 Ave. of the Americas
New York, NY 10020

BALANCE SHEET (free)
Southwestern Publishing Co.
5101 Madison Road
Cincinnati, OH 45227

BUSINESS EDUCATION WORLD (free)
Gregg/McGraw-Hill
13955 Manchester Road
Manchester, MO 63011

MODERN OFFICE PROCEDURES (free)
P.O.Box 5746-11
Cleveland, OH 44101

MANAGEMENT WORLD
Circulation Office
Management World
AMS Building
Willow Grove, PA 19090

OYMAX
P.O.Box 3120, Dept. 42
Melno Park, CA 94025

BYTE: THE SMALL BUSINESS JOURNAL
Gregg/McGraw-Hill
70 Main Street
Peterborough, NH 03458

REPROGRAPHICS
The Innes Publishing Co.
Reprographics
P.O.Box 368
Northbrook, IL 60062

BUSINESS WORLD WOMAN
University Comm., Inc.
37 West Cherry Street
Rakway, NJ 07065

WORKING WOMAN
P. O. Box 10132
Des Moine, IA 50340

THE OFFICE
The Office Publications, Inc.
1200 Summer Street
Stamford, CT 06904

SHORTHAND MOTIVATION MANUAL
Gregg/McGraw-Hill
13955 Manchester Road
Manchester, MO 63011

SAVVY
P.O.Box 2495
Boulder, CO 80322

LEADERSHIP
American Soc. of Assoc. Exec.
1101 16th Street N.W.
Washington, DC 20036

MODERN SECRETARY (free
National College
Rapid City, SD 57701

THE COMPUTING TEACHER
Computer Center
Eastern Oregon State College
LaGrande, OR 97850

BUSINESS WEEK
P.O. Box 430
Hightstown, NJ 08520

WALL STREET JOURNAL
Dow Jones Industry, Inc.
200 W. Monroe
Chicago, IL 60606

TEACHER EXCHANGE (free)
Houghton-Mifflin
1900 S. Batavia Averue
Geneva, IL 60134

FORUM (free to members of NBEA)
1906 Association Drive
Reston, VA 22091

VOCATIONAL EDUCATION
AVA, Inc. (free to members of AVA)
2020 North 14th Street
Arlington, VA 22201

T.H.E. JOURNAL
Information Synergy, Inc.
P.O. Box 992
Action, MA 01720

WORD PROCESSING AND INFORMATION SYSTEMS
51 Madison Avenue
New York, NY 10010

COMPUTER WORLD
375 Cochitutate Road
Box 880
Franningham, MA 01701

K. Community Relations

Community and business involvement in the business education department is essential for the success of competency-based instruction. The role of the department is to provide competent and proficient workers for the business community and an informed business community is a valuable information resource in competency-based instruction. In addition, school support is vital to the success of the program.

Business teachers are primarily responsible for keeping the school and the public informed about the work of the department, the types of preparation being offered and the manner in which the department serves the school and the community.

Each business teacher should actively participate in the business and professional organizations and activities of the community insofar as possible.

Suitable publicity should be given to the work of the department, as well as the achievement of its business and students and graduates. This publicity should be both in-school and out-of-school publicity.

A successful community relations program begins within the school. Every business teacher should:

1. Manage an effective, efficient learning environment.

2. Work with guidance personnel and teachers from other disciplines by providing accurate, timely information about business education.

3. Exemplify strong personal integrity.

4. Accentuate the positive values of business education.

5. Encourage students to use their business skills in their participation in school activities.

6. Encourage students to support and participate in local, state, regional, and national youth organizations.

7. Encourage students to use such in-school media as newspapers, bulletin boards, assembly programs, closed-circuit television, and public address systems in the promotion of business education.

In order to provide an effective community relations program outside the school, every business teacher should:

1. Arrange open houses, career days, industry and business days, and other similar activities that will create interest between school, community, and state legislators.

2. Use all such public media as radio, television, and the press to publicize business education in the local community.

3. Present business education interests of the school to various community groups through lectures, presentations, and discussions.

4. Sponsor and participate in workshops and conferences involving business educators, students, and business personnel.

5. Direct youth programs toward public service and community involvement.

6. Arrange and conduct field trips through which school and community information exchanges will take place.

7. Initiate programs for classroom presentation by resource persons affiliated with the community, business, and industry.

8. Join and participate actively in organizations whose membership is composed of representatives from local business and industry.

9. Create and use a representative advisory committee of the school and community to assist in the development, promotion, and modification of the business education program.

10. Develop a means of giving recognition to individuals and groups providing special services to business education.

11. Organize school-supervised programs which allow all business education students to apply business knowledges, attitudes, and skills in business and industry.

12. Assist students in securing appropriate employment.

13. Maintain interest in former students through follow-up studies.

14. Encourage continuing education programs in business education.

L. Students' Rights and Responsibilities

1. Recruitment

Recruitment procedure and promotional activities are made without regard to race, color, national origin, sex, or handicap. Various methods of recruitment are:

a. Guidance counselor (recommend the use of the business vocational guidebook)
b. Career awareness day
c. Exploratory business classes
d. Business class visitation day
e. Recruitment information
    1. Letter to parents or students prior to the spring registration
    2. Bulletin boards and displays
    3. Posters and fliers

2. Accessibility

All individual vocational students will be provided equal opportunity in securing training and education opportunities without regard to age, sex, national origin, race, color, creed, handicap, or any disadvantage factor.

All school personnel must made a commitment to the idea that handicapped students, like all others, have a right to acquire the content and skills offered by programs in the vocational-occupational area.

All students are eligible to participate in cooperative education programs if they are part of the regular vocational offering. All training agreements in cooperative education programs contain assurance from the employer that students will be accepted and assigned to jobs and otherwise treated without regard to their race, color, national origin, sex, or handicap.

3. Equal Access

All students are evaluated by the same achievement/proficiency standards.

All school publications, promotional brochures, and literature shall contain nondiscriminatory, nonsexist statements. All school personnel shall eliminate personal actions that could be interpreted as sexist, discriminatory and stereotypic.

4. Special Needs

Every school-age child (age 5 through 20) in the state having a mental, physical or psychological handicap or social maladjustment which impairs learning is entitled to and must receive, an appropriate education in accordance with his or her capabilities.

The program will be accessible to special population groups (handicapped, minorities, males and females, limited English speaking).

5. Special Services

All student services such as counseling, financial aids, work study, job placement and other student services are available to all students.

IV. APPENDIX

APPENDIX A

PROGRAM STATUS REPORT

The self-study should be completed on an annual basis to determine the strengths and weaknesses of the program. If space is not adequate, please feel free to write on the back or attach additional pages.

1. How many teachers are in the department? Who is the department chairperson for next year?

2. Are the recommended core classes for the model size being taught?
Yes____ No____
If no, which courses are not being taught? Is there a special reason?

Are additional classes being taught? Yes____ No____
If yes, are they the ones recommended in the next model or ones from the elective list?

Are the recommended content topics for each course being taught?
Yes____ No____
If no, are they being taught in other courses? Which ones?

3. Is Introduction to Business being taught in the school district and where?
Yes____ No____
If no, are provisions being made to offer Typwriting as an exploratory course? Yes____ No____
If no, do you need additional help in creating an exploratory course?
Yes____ No____ The State Coordinator can be contacted for help.

4. Is a capstone class offered? Yes____ No____
If yes, is there a Co-op? Yes____ No____
If no, is there a special reason? Yes____ No____

Is a model office simulation offered? Yes____ No____
What materials are being used?

5. Does the department have any special needs students enrolled in class?
Yes____ No____
If yes, did the department actively participate in writing the Individual Vocational Education Program (IVEP)? What special needs changes were made if any?

6. Is the department conscientiously following the recommendations for allowing equal access? Yes____ No____

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If yes, what specific area has the department addressed this year?

If no, what are the areas in which the department needs to improve?

7. Does the school have a guidance counselor? Yes___ No___
A vocational guidance counselor? Yes____ No____

Does the department work closely with the guidance staff in following and how?

Student recruitment?

Identifying student career objectives?

Preparing learning plans?

Administering the follow-up study?

8. Is there an organized Future Business Leaders of America? Yes____ No___
If yes, did the students participate at the various levels? Where? In what area?

State?

Regional?

National?

9. What projects were develcped this year?

10. Has an advisory council been established? Yes____ No____
If yes, in what areas was it helpful? In what areas could it be more helpful? List members of the council.

11. Does the department have adequate facilities, *equipment, instructional materials and supplies? Yes ____ No ____

What plans have been made to eliminate these needs?

12. Does the department conduct a follow-up study? Yes___ No___
If yes, what procedure is used?

13. Is the department receiving federal funds: Yes____ No____
If yes, was the program evaluated this year?
Have actions been taken to comply with recommendations? What?

14. Is there a need for writing a federal proposal? Yes____ No____
If yes, contact your State Coordinator for forms and information.

15. Do you know who to contact at the state level for additional help?
See the appendix for state personnel.

16. Do you have suggestions for inservice topics? Contact the State Coordinator or list here.

17. Will all the business teachers be returning to your school?
Yes____ No____
What teacher(s) have signed a contract with another school? Where?

18. Does the department use the Wyoming Business Education Standards of Excellence Handbook? Yes____ No____
Are there recommendations for improvement?

19. Has your department developed a philosophy of vocational education?

20. How many of your department members have attended a professional meeting this year? What meetings?

*Do you have acoustical floor covering, window covering, a master electrical switch, or proper lighting?

APPENDIX B

ORGANIZATION STRUCTURE

A. State Coordinator of Business Education

The Coordinator of Business Education is a full-time member of the Vocational Programs Unit. The Coordinator is assisted by the Wyoming Coordinator of Future Business Leaders of America/Phi Beta Lambda. Voluntary assistance is received from yearly appointed advisors of FBLA/PBL.

The primary responsibility of the Coordinator is to insure that vocational programs meet the career objective needs of Wyoming students and that the program prepares these students for entry-level job competencies. Other duties of the Coordinator include:

1. Utilizing a state advisory committee;
2. Working with vocational BE teacher educators;
3. Drafting program standards and guidelines;
4. Conducting local, regional, and state workshops;
5. Working with professional organizations;
6. Visiting local programs;
7. Conducting periodic program evaluations;
8. Assisting with curriculum development.

B. Wyoming Steering Committee for Business Education

The Wyoming Steering Committee for Business Education is composed of 24 persons. There are three business representatives from each geographical area making a total of 15 business members, three business teachers from the secondary level, and two community (postsecondary) college representatives. Ex-officio members are the State Coordinator for Business Education, a representative of the University of Wyoming, and the President and President-elect of the Wyoming Business Education Association.

C. Professional Organizations

The members and executive committee of the professional organizations, representing the vocational educators, contribute heavily to decision making for vocational business education. The organizational structure is:

State Level:	Wyoming Business Education Association (WBEA)
	Wyoming Vocational Association (WVA)
Regional Level:	Mountain-Plains Business Education Association (M-PBEA)
National Level:	National Business Education Association (NBEA)
	American Vocational Association (AVA)

1. Wyoming Business Education Association

The purpose of WBEA is to promote interest and develop quality in all phases of education for and about business and to encourage professional growth and cooperative interaction.

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WBEA is composed of individuals involved in teaching or administering programs at the local and state levels. The organization develops and provides supplementary program materials at inservice meetings held throughout the school year. The organization supports the business education student leadership organizations--Future Business Leaders of America and Phi Beta Lambda. It also cooperates with the State Business Education Coordinator and the Vocational Unit Director.

2. Wyoming Vocational Association

WVA is the state representative of all vocational personnel to the American Vocational Association. The purpose of WVA is to unite Wyoming vocational personnel via newsletters, an annual convention, and joint efforts with the State Department.

The Business Education section of WVA provides for its membership inservice, information about current trends, enables you to remain current in your profession, and makes you knowledgeable about legislation. It is recommended that instructors be a part of this organization.

The Business Education section is one of the largest of the WVA divisions. Its communications are always included in the semiannual WVA newsletter.

3. Mountain-Plains Business Education Association

M-PBEA represents all interested business and office personnel at the regional level with the National Business Education Association. It holds an annual meeting each year.

4. National Business Education Association

NBEA is a national organization representing all individuals interested in business education at the local, state, and regional levels. Legislative activities for the continued support of business education--along with interstate exchange of ideas, curriculum, etc.,--are the priorities of NBEA.

5. American Vocational Association

AVA is a national organization representing all vocational personnel in all 50 states. Legislative activities for the continued support of vocational education--along with interstate exchange by occupational section of procedures, curriculum, materials, etc.,--are the priorities of AVA.

See Appendices F and G for the Officers of WBEA and WVA.

APPENDIX C

COOPERATIVE OFFICE EDUCATION

The Cooperative Office Education course is an important part of any vocational business education program. The procedure or sequence of activities required for developing a new cooperative vocational education course will vary with the type of community and program. There are, however, certain basic activities which are common to all program initiation projects. Listed below are the basic activities which the local planners and coordinators must consider and conduct in organizing a sound cooperative vocational program.

1. Develop rationale for the program. In this activity program planners or the coordinator should conduct a feasibility study to determine employer interests, employment opportunities, and student interests. Based upon the information obtained from this study and from other sources, statements of the need for and value of a cooperative vocational education program should be written and supported with documented evidence.

2. Establishing a steering committee made up of employers, employees, school personnel, parents and students to assure local and state support.

3. Develop a basic outline of a program plan utilizing the steering committee. In this activity, program planners and steering committee should develop statements regarding the purpose and plan of the program, an outline of activities to start the program, policy statements concerning student selection and placement, training station selection, nature of the in-school instruction program, nature of on-the-job training program, required facilities and equipment, tentative operating schedule, coordinator qualifications and responsibilities and other needed policy statements.

4. Obtain approval of the program plan and permission to conduct the program from the Board of Education and the school administration.

5. Hire a qualified teacher-coordinator based on recommendations made by the steering committee.

6. Establish an advisory committee to review the policy statements and operating details of the program established by the steering committee and modify the program plan if needed.

7. Begin to develop program details such as arranging for facilities and equipment, prepare information about the program, prepare necessary forms, develop a public relations program, etc.

8. Announce availability of the program and provide program information to faculty personnel, students, and parents.

9. Attract and enroll students for the program. This is a very important activity and should be carefully planned and conducted. It involves encouraging students to apply for the program who can profit most from the program.

10. Conduct a community occupational survey or other suitable studies to determine employment opportunities and the nature of the work force. This activity should include obtaining all information concerning the community, analyzing the obtained data and developing summary reports that can be used to identify training stations and place students.

11. Establish training stations. Inform prospective employers about the program and select the most desirable training stations based on a planned strategy.

12. Explain details of the program to students and prepare them for the job application, employment interview, and job placement. In this activity the coordinator should work with the students to identify career goals and occupations, specify needed competencies, write statements of expected student outcomes, and develop tentative training plans.

13. Arrange for on-the-job training with employers. In this activity the coordinator will explain the program purposes, policies, and procedures of the program and review student-coordinator developed training plans. The coordinator will also arrange for student-employer interviews and select and orient employer's on-the-job supervisors.

14. Plan job-related instruction. In this activity the coordinator and student will develop job-related instructional outlines. This activity should include ordering instructional materials.

15. Establish schedules for on-the-job training and classroom instruction.

16. Establish a schedule for supervision and coordination.

17. Develop and maintain records for recording student progress, program operation, and evaluation.

18. Prepare and organize co-curriculum activities such as a vocational youth organization.

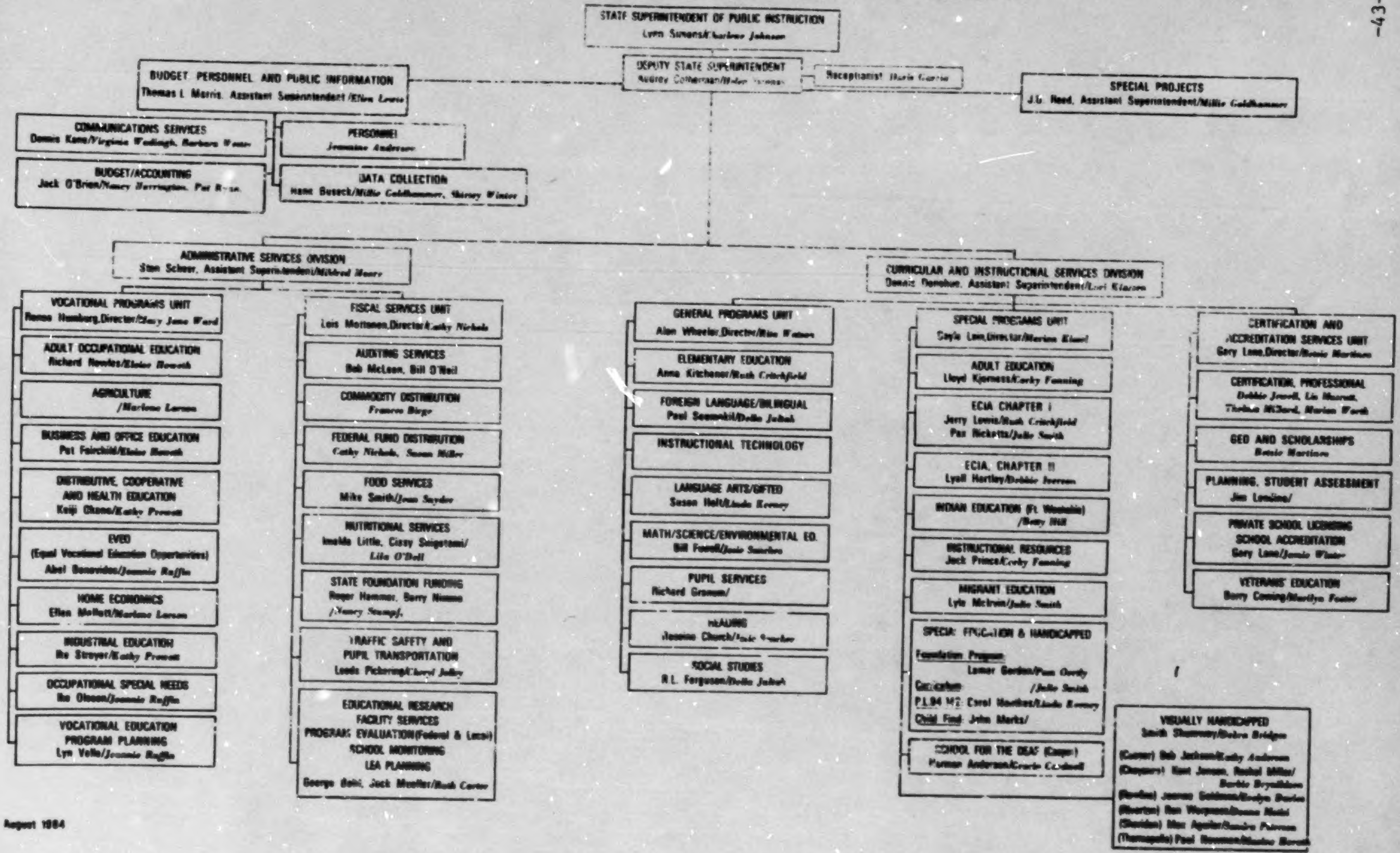
19. Establish and provide for evaluation of the program by means of a follow-up of the students and self-evaluation devices.

Students in a cooperative course must be supervised by a qualified teacher/coordinator and the employer. A training plan for each student should be developed. It should include the essential competencies and experiences that are to be acquired during the training period. A plan will be utilized to aid in the selection of students who enroll in the capstone course and to select, develop, and evaluate training competencies. All records must be accurate and up to date. These records should include written career objectives, training agreements, training plans, hours, wages, and competencies required during the program. A record for each student must be on file.

Instructors employed as coordinators of the cooperative course for vocational business education students will be employed on an extended contract. This should provide time to initiate training stations, follow up trainees, prepare and develop reports and surveys, etc. Also, the business education coordinator should have at least one preparation period and coordination time.

Examples of various forms are included in Appendices K through P. For further information contact the State Coordinator.

Personnel Chart -- Wyoming State Department of Education


STATE SUPERINTENDENT OF PUBLIC INSTRUCTION
Lynn Simons/Charlene Johnson
DEPUTY STATE SUPERINTENDENT
Audrey Cotherman/Helen Thomas
Receptionist Doris Garcia
SPECIAL PROJECTS
J.G. Reed, Assistant Superintendent/Millie Goldhammer
BUDGET, PERSONNEL AND PUBLIC INFORMATION
Thomas L. Morris, Assistant Superintendent/Ellen Lewis
COMMUNICATIONS SERVICES
Dennis Kane/Virginia Wadlington, Barbara Wenz
BUDGET/ACCOUNTING
Jack O'Brien/Nancy Harrington, Pat Ryan
PERSONNEL
Jeannine Andersen
DATA COLLECTION
Hank Busack/Millie Goldhammer, Shirley Winter
ADMINISTRATIVE SERVICES DIVISION
Stan Scheer, Assistant Superintendent/Mildred Moore
VOCATIONAL PROGRAMS UNIT
Ramon Hamburg, Director/Mary Jane Ward
ADULT OCCUPATIONAL EDUCATION
Richard Rowles/Elaine Howath
AGRICULTURE
/Marlene Larson
BUSINESS AND OFFICE EDUCATION
Pat Fairchild/Elaine Howath
DISTRIBUTIVE, COOPERATIVE AND HEALTH EDUCATION
Keiji Okano/Kathy Provost
EVEO
(Equal Vocational Education Opportunities)
Abel Benavides/Jeannie Ruffin
HOME ECONOMICS
Ellen Moffatt/Marlene Larson
INDUSTRIAL EDUCATION
Ike Strayer/Kathy Provost
OCCUPATIONAL SPECIAL NEEDS
Ike Olsson/Jeannie Ruffin
VOCATIONAL EDUCATION PROGRAM PLANNING
Lyn Vella/Jeannie Ruffin
FISCAL SERVICES UNIT
Lois Mottonen, Director/Kathy Nichols
AUDITING SERVICES
Bob McLean, Bill O'Neil
COMMODITY DISTRIBUTION
Frances Birge
FEDERAL FUND DISTRIBUTION
Cathy Nichols, Susan Miller
FOOD SERVICES
Mike Smith/Jean Snyder
NUTRITIONAL SERVICES
Imelda Little, Cissy Seigstomi/
Lila O'Dell
STATE FOUNDATION FUNDING
Roger Hammer, Barry Nimmo
/Nancy Stumpf.
TRAFFIC SAFETY AND PUPIL TRANSPORTATION
Leeds Pickering/Cheryl Jolley
EDUCATIONAL RESEARCH
FACILITY SERVICES
PROGRAM EVALUATION(Federal & Local)
SCHOOL MONITORING
LEA PLANNING
George Bohl, Jack Mueller/Ruth Carter
CURRICULAR AND INSTRUCTIONAL SERVICES DIVISION
Dennis Donohue, Assistant Superintendent/Lori Klassen
GENERAL PROGRAMS UNIT
Alan Wheeler, Director/Rita Watson
ELEMENTARY EDUCATION
Anna Kitchener/Ruth Critchfield
FOREIGN LANGUAGE/BILINGUAL
Paul Soumokil/Della Jubeh
INSTRUCTIONAL TECHNOLOGY
LANGUAGE ARTS/GIFTED
Susan Holt/Linda Keeney
MATH/SCIENCE/ENVIRONMENTAL ED.
Bill Futrell/Josie Sanchez
PUPIL SERVICES
Richard Granum/
READING
Jeannine Church/Josie Sanchez
SOCIAL STUDIES
R.L. Ferguson/Della Jubeh
SPECIAL PROGRAMS UNIT
Gayle Lain, Director/Marian Kisel
ADULT EDUCATION
Lloyd Kjorness/Corky Fanning
ECIA CHAPTER I
Jerry Lewis/Ruth Critchfield
Pax Ricketts/Julie Smith
ECIA, CHAPTER II
Lyall Hartley/Debbie Iverson
INDIAN EDUCATION (Ft. Washakie)
/Betty Hill
INSTRUCTIONAL RESOURCES
Jack Prince/Corky Fanning
MIGRANT EDUCATION
Lyle McIrvin/Julie Smith
SPECIAL EDUCATION & HANDICAPPED
Foundation Program
Lamar Gordon/Pam Overly
Curriculum /Julie Smith
P.L.94-142: Carol Hastings/Linda Keeney
Child Find: John Marks/
SCHOOL FOR THE DEAF (Casper)
Farmer Anderson/Gracie Cardwell
VISUALLY HANDICAPPED
Smith Shumway/Debra Bridges
(Casper) Bob Jackson/Kathy Anderson
(Cheyenne) Kent Jensen, Rachel Miller/
Barbie Brynildsen
(Rawlins) Jeanne Goldman/Evelyn Decker
(Riverton) Ron Wagman/Donna Mahl
(Sheridan) Max Aguilar/Sandra Peterson
(Thermopolis) Paul Newman/Sandra Barrett
CERTIFICATION AND ACCREDITATION SERVICES UNIT
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Debbie Jewell, Liz Murray,
Thelma McCord, Marian Worth
GED AND SCHOLARSHIPS
Bessie Martinez
PLANNING, STUDENT ASSESSMENT
Jim Lendino/
PRIVATE SCHOOL LICENSING
SCHOOL ACCREDITATION
Gary Lane/Jamie Winter
VETERANS' EDUCATION
Barry Conning/Marilyn Foster

August 1984

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APPENDIX E
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APPENDIX F

1985 WBEA OFFICERS

President		Gary Joy Sheridan High School Lewis at Adair Sheridan, WY 82801
President Elect		Carol Ann Strader High School III 2201 Morrie Avenue Cheyenne, WY 82001
Secretary-Treasurer		Mary Jean Reinhardt Glenrock High School Box 1270 Glenrock, WY 82637
Representatives		
NW	Senior	Patricia Hartman Basin High School 919 W. Basin Basin, WY 82410
	Junior	Axel Stockhouse Greybull High School 600 N. 6th Street Greybull, WY 82426
NE	Senior	Sherilyn Cervenka Campbell County High School 1000 Camel Drive Gillette, WY 82716
	Junior	
CENTRAL	Senior	Lisa Neese Career Office Studies/Clerical Cluster Casper College 125 College Drive Casper, WY 82601
	Junior	Ann Lehner Glenrock High School Box 1270 Glenrock, WY 82637

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Junior

Robert Herring
Encampment High School
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Encampment, WY 82325

SE Senior

Joan Prosinski
Southeast High School
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Junior

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Durla Cockley
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APPENDIX G

WYOMING VOCATIONAL ASSOCIATION

Executive Board - 1984-85

PRESIDENT	Ken Eggleston Box 151 Tensleep, WY 82442
PRESIDENT-ELECT	Clark Allen School Admin. Bldg. 2810 House Cheyenne, WY 82001
PAST PRESIDENT	Marcy Helser 2520 Deming Cheyenne, WY 82001
EXECUTIVE SECRETARY	Robert Meredith Box 124 Shoshoni, WY 82649
ADMIN/POST-SEC	Clark Allen
AGRICULTURE-President	Bill Despain Howe Lane Laramie, WY 82070
President-elect	Jerry Paxton P.O. Box 201 Encampment, WY 82525
BUSINESS EDUCATION President President-elect	Ellie Noonan 189 LaPaloma Dr. Rawlins, WY 82301
ELEMENTARY AWARENESS President President-elect	Sandi Eggleston Box 151 Tensleep, WY 82442
GUIDANCE-President	Russ Anderson 827 Mass. Ave. Rock Springs, WY 82901
President-elect	Karen Hayhurst 134 Oak Wheatland, WY 82201
HEALTH OCCUPATIONS President President-elect	Luann Edwards 935 Shoshoni Cheyenne, WY 82009

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HOME ECONOMICS President President-elect	Kathy Cunningham 290 Amoretti Lander, WY 82520
INDUSTRIAL EDUCATION President	Steven Timothy Box 727 Afton, Wy 83110
President-elect	Farren Johnson Box 429 Mountain View, WY 82939
MARKETING & DISTRIBUTIVE President	Susan Boyd Box 1777 Riverton, WY 82501
President-elect	Bill Cleleand 3706 Madison Rock Springs, WY 82901
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SACVE Executive Sec.	Clint Harris 410 Grand Ave. Laramie, WY 82070

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Agriculture	Giovonnia Ferguson	Dr. Carl Reynolds Dr. James Durkee
Business Education	Pat Fairchild	Dr. Jim Zancanella
Disadvantaged/Spec. Ed.	Ike Oleson	Dr. Jim Durkee
Marketing & Distributive	Dr. Keiji Okano	Dr. Jim Zancanella
Elem. Awareness	Anna Kitchener	
Guidance	Dick Granum	

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Health Occupations	Dr. Keiji Okano	
Home Economics	Ellen Mellott	Dr. Dolores Gade
Industrial Education	Ike Strayer	Dr. Lyndall Lundy
Post Secondary	Richard Rowles	
Sex Equity	Abel Benavides	

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APPENDIX H

FUTURE BUSINESS LEADERS OF AMERICA
1984-1985

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State Youth Coordinator:

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APPENDIX I

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Dr. James Zancanella
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University Station, Box 3374
Laramie, WY 82071
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APPENDIX J

The Wyoming Steering Committee for Business Education supports this statement:

WYOMING VOCATIONAL EDUCATION

Vocational education is a school and community responsibility that provides knowledge, skills, and attitudes compatible with manpower needs which specifically increases a student's skills and potential within a learning environment simulating the occupation work setting. The programs are provided to all who can personally benefit from the instruction through activities that are built on current and changing occupational requirements.

Vocational education is a program that has the following characteristics:

Serves all learners who can benefit from the instructional activities.

Has facilities, equipment and materials that simulate an occupational work setting.

Is taught by an instructor certified in the related vocational area.

Has an active advisory committee.

Provides the framework for a life-long human development system that will include--1) orientation courses and activities to study the structure of business, industry, labor, and government; 2) exploratory courses and activities to investigate the occupation career structure of work and to develop employability skills; 3) preparation courses and activities to train, retrain, and upgrade for current and future labor market needs; and 4) transitional services and activities to aid youth and adults moving from school to work and from work to school. Crucial to vocational education is program flexibility that will provide multiple learning options for youth and adults to make career choices and career changes.

Has local and state evaluation involving school and community based upon defined program standards.

Has a vocational student organization.

Has instructors who have one year of verified work experience in the related area outside the field of education.

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APPENDIX K

POSSIBLE FORMAT

CAREER OBJECTIVE AND LEARNING PLAN

Student		Grade Level	Term	
Counselor		Planned Graduation Date		
What are your current post high school career educational plans? (Indicate the alternatives you are considering below)		How certain do you feel about your Plans?		
		Just Thinking About It	Reasonably Certain I Will Pursue It	Very Certain
Career Plans	1.			
	2.			
	3.			
	4.			
Educational Plans	1.			
	2.			

Career Objective Requirements		When do you plan to complete each?			
Confirmed with counselor? ___ Yes ___ No	Credits Needed	9th Grade	10th Grade	11th Grade	12th Grade
Electives					
Other					
TOTAL					

Distribution: Original (White) - LC/files; Yellow - Student; Pink - Permanent file; Goldenrod - Parents

APPENDIX L

STUDENT PROGRESS SHEET

POSSIBLE FORMAT

Name______________________ Anticipated date of graduation______________________

Course of Study	Year Completed	Grade Average
Typing I	______	______
Typing II	______	______
Projection Speed ______		
Speed ______ Errors ______		
Filing		
Alphabetic	______	______
Numeric	______	______
Cross-Reference	______	______
Subject	______	______
Geographic	______	______
Equipment & Supplies	______	______
Records Management	______	______
Business Machines		
10-Key Electronic Calculator	______	______
Duplication		
Spirit Ducplicator	______	______
Mimeograph	______	______
Photocopier	______	______
Thermofax	______	______
Business Communications		
Grammar	______	______
Spelling	______	______
Punctuation	______	______
Communication Rules	______	______
Listening	______	______
Speaking	______	______
NonVerbal Communication	______	______
Business Correspondence		
Letter Compositions	______	______
Machine Trascription	______	______
Production Speed ______		
Introduction to Computers	______	______
Data Processing Systems		
Manual & Mechanical	______	______
Unit Record Systems	______	______
Electronic Computers	______	______
Employment Study		
Letter of Application	______	______
Resume	______	______
Interviews	______	______
Job Retention	______	______

Course of Study	Year Completed	Grade Average
Human Relations in Business	______	______
Business Principles	______	______
Business Law	______	______
Economics	______	______
Accounting I		
Elements of Accounting	______	______
Accounting Subsystems	______	______
Accounting Data Processing	______	______
Accounting II		
Partnerships	______	______
Corporations	______	______
Analyzing Financial Records	______	______
Shorthand I (theory & dictation)	______	______
Transcription Speed ______		
Dictation Speed ______		
Shorthand II (dictation & transcription)	______	______
Transcription Speed ______		
Dictation Speed ______		
Business Math	______	______
Job Station Simulations (list)		
______________	______	______
______________	______	______
______________	______	______
______________	______	______
______________	______	______
Office Simulations (list)		
______________	______	______
______________	______	______
______________	______	______
______________	______	______
______________	______	______
Cooperative Office Education (list)		
______________	______	______
Word Processing With Electronic Typewriters	______	______

APPENDIX M
BUSINESS EDUCATION
OCCUPATIONAL OBJECTIVE AND LEARNING PLAN
COURSE SEQUENCE PROGRAMS

Name ______________________________

Address ______________________________

____

Student's Telephone Number ______________________________

School ______________________________

Occupational Objective ______________________________

Date Started ______________ Date Completed ______________

Student's Social Security Number ______________________________

Grade Level ______________________________

	Typing I	Typing II	Typing III	Typing IV	Bookkeeping I	Bookkeeping II	Accounting I	Accounting II	Recordkeeping I	Recordkeeping II	Bus. Math I or Eq.	Bus. Math II or Eq.	Steno. I	Steno. II	Steno. III	Transcription	Steno. IV	Transcription	Cler. Assts. ½ credit	Business Service	Office Machines	Office Machines	Cooperative Office Education							Business Law	Business Principles	Consumer Economics	Total Business Credits Required
Please Check																																	
Grade Earned																																	
OCCUPATIONS																																	
Clerk, General Office	x	x	*	*	**	**	**	**	**	**	*	*								*	x	x	*	*	*	*	*	*	*	*			8
Clerk Typist	x	x	x	x	***	***	***	***			*	*								*	x	x	*	*	*	*	*	*	*	*			12
Secretary/Steno.	x	x	x	x	***	***	***	***			*	*	x	x	x	x	x	x		*	x	x	*	*	*	*	*	*	*	*			14
Bookkeeper	x	x			xx	xx	xx	xx			*	*									*	*	*	*	*	*	*	*	*	*			10

x Required
xx Required Bookkeeping or Accounting
* Recommended
** Recommended Bookkeeping, Accounting, or Recordkeeping
*** Recommended Bookkeeping or Accounting

ALL OCCUPATIONAL STUDENTS ARE REQUIRED TO TAKE ONE OF THE FOLLOWING FOUR COURSES: BUSINESS MATH, BUSINESS LAW, BUSINESS PRINCIPLES, CONSUMER ECONOMICS.

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APPENDIX N
POSSIBLE FORMAT
COOPERATIVE BUSINESS EDUCATION
STUDENT PROFILE CARD

Name: ______________________________ Birth date ________ Grade ____

Address ______________________________ Phone ____________

Parents name: ______________________________

Guardian Name: ______________________________

How long have you lived in Laramie? _____ What are your responsibilities at home: ______

____

Is it necessary for you to work? _______ Why? ______________________________

Do you have transportation to get you to and from work? ______________________________

What school organizations do you belong to? ______________________________

____

What are your favorite hobbies and/or activities? ______________________________

____

Have you had any illness, accident, defects in sight, hearing, speech, or any other physical problems that would affect job performance? ______________________________

____

What is your Father's/Guardian's occupation? ______________________________

What is your Mother's/Guardian's occupation? ______________________________

PLEASE MARK THE BUSINESS COURSES YOU HAVE TAKEN:

_____Typing I (GWPM ____Er____)
_____Typing II (GWPM ____Er____)
_____Typing Ia (GWPM ____Er____)
_____Bookkeeping I
_____Bookkeeping II
_____Filing
_____Word Processing

_____Office Practice I
_____Shorthand I (GWPM____)
_____Shorthand II (GWPM____)
_____Business Law
_____Duplication Proc.
_____Business Communication

Any other Business courses ______________________________

I wish to receive Work Experience Credit ______________________________

I wish to receive release time _____period _____period

My attendance record has been: _____excellent _____good _____fair _____poor

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Personal data sheet

SCHOOL TRAINING

A. List all courses you have taken in school

Freshman year	Sophomore year	Junior year	Senior year

What have been your favorite subjects?

PAST WORK EXPERIENCE

List below the places where you have worked in the past or are currently working for. Begin with the most current.

Name of Firm	Employer	Date Employed	Type of Work

Names of schools attended:

______________________________ ______________________________

______________________________ ______________________________

FUTURE PLANS

Immediate Career Goals ______________________________

Long Range Career Goals ______________________________

After High School Education - - - College? ______________ Business School __________

Other: ______________________________

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APPENDIX O
POSSIBLE FORMAT
COOPERATIVE OFFICE EDUCATION TRAINING AGREEMENT

Grade ________
Age ________

This agreement is to (1) define clearly the conditions and schedule of training whereby the student, ____________________ is to receive training as a/an ______________________________ and (2) serve as a guide to the cooperating parties: the __________________ (company) and the ____________ Public Schools, in providing the student with opportunities for training in the basic skills of the occupation and the technical information related to it.

THE STUDENT AGREES to perform diligently the work experiences assigned by the employer according to the same company policies and regulations as apply to regular employees. The student also agrees to take advantage of every opportunity to improve his efficiency, knowledge and personal training period according to the following plan:

1. The beginning wage will be $______per______for______hours per school week.
2. A review of student progress will be made jointly by the employer and coordinator at least once each semester for the purpose of improving the student's job performance.

THE SCHOOL AGREES, to provide a teacher/coordinator, who will act as liason between the company, the school and the student, and who will provide related classroom instruction and supervision for the student both in school and on the job.

The training period begins the _________________day of _________, 19__ and extends through ________________, 19__. There will be a probationary period of __________ days during which the interested parties may determine if the student has made a wise choice of an occupation, and if the training should be continued.

____

____

Approvals:

______________________________ (Student)

______________________________ (Employer or Representative)

______________________________ (Parent or Guardian)

______________________________ (Teacher/Coordinator)

APPENDIX P
POSSIBLE FORMAT
EDUCATIONAL TRAINING PLAN

STUDENT'S NAME ______________________________ HOME PHONE ____________

ADDRESS ____
Street   City   State   Zip

CAREER OBJECTIVE: ____________________ IMMEDIATE OBJECTIVE: __________

NAME OF TRAINING STATION: ____

ADDRESS ____
Street   City   State   Zip

IMMEDIATE SUPERVISOR WILL BE: ____________________ PHONE ____________

STUDENT'S AGE ____________ WORKING HOURS ________ RELEASED TIME ________

PARENT OR GUARDIAN ______________________________ PHONE ____________

PLAN

THE STUDENT WILL PARTICIPATE IN THE FOLLOWING GENERAL ACTIVITIES WHICH PERTAIN TO THE SKILLS DESIRED TO ACHIEVE HER/HIS OBJECTIVES STATED ABOVE:

LIST OF TASKS BEING PERFORMED AT JOB BEGINNING:

TASKS	DATE STARTED	DATE COMPLETED	CONTINUING DATE CHECKED

NEW TASKS ADDED	DATE STARTED	DATE COMPLETED	CONTINUING DATE CHECKED

SIGNATURES:

______________________ Student

______________________ Training Sponsor

______________________ Parent or Guardian

______________________ Teacher/Coordinator

APPENDIX Q
TERMINOLOGY

1. The block method is a delivery system wherein a minimum of two regularly scheduled class periods or a combination of modules which is equivalent to a minimum of two conventional class periods is used to offer the employment traits and skill training which meets the job-entry standards in the business community.

2. Capstone: The purpose of the capstone course is to integrate the sequential learning previously achieved by demonstration through cooperative work experience and/or simulated classroom experience. This course occurs at the end of the training period.

3. COOP: The cooperative office education (COE) is a culminating activity of a vocational business and office program. The COE consists of a supervised cooperative on-the-job training experience and related classroom instruction.

4. Core Courses: The specific courses of instruction required for a vocational business and office program.

5. Course sequence method is a delivery system by which a logical order of presentation of program content is offered with some courses acting as a prerequisite to others depending upon their level of difficulty. The combination of these courses creates a program which meets entry-level job standards.

6. Individualized learning: This is a technique utilized to combine the career objective of the student with the appropriate program content to develop a quality employee in the length of time necessary to proficiently acquire all skills.

7. Learning plan: A list of courses or units or activities a student must complete to achieve his/her written career objective.

8. Office procedure employement skills: The basic skills necessary for successful business and office employment as determined by tasks performed in business and industry.

9. Related classroom instruction: Each student participating in the cooperative program is to be concurrently enrolled in the related class. The related class is to be designed to upgrade trainees and to reinforce students' job skills.

10. Simulation: Simulation activities do not duplicate actual cooperative office education training, but simulation materials do, however, provide hypothetical work flow in a classroom setting. Simulation activities that are most beneficial to students are those conducted in an office-like atmosphere.

11. Specialized training cluster: The part of the program that offers training for business and industry with special/unique requirements.

12. Written career objective: A simple statement, in writing, declaring a specific career in the business area.

APPENDIX R

An entire copy of Basic Entry-Level Competencies Needed for Employment is enclosed for your information.

REPORT OF BASIC ENTRY-LEVEL COMPETENCIES NEEDED FOR EMPLOYMENT

by

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University of Wyoming
Laramie, Wyoming

and

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State Supervisor of Business Education
State Department of Education
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University of Wyoming
Laramie, Wyoming
August, 1984

REPORT OF BASIC ENTRY-LEVEL COMPETENCIES NEEDED FOR EMPLOYMENT

During the 1983-1984 school year, the Wyoming Business Education Steering Committee determined that there should be a follow-up study of studies previously conducted in 1979-1980 and 1981-1982 to determine if change had occurred in the requirements business expects of its office workers. The results of the 79-80 and 81-82 studies were incorporated into the then current standards manual for business and office education. The results of this study, also, will be incorporated into the 1984 standards manual.

The 1984 questionnaire differed from its predecessors in that no questions relative to economic status were asked and the questions which were asked were pared down statistically as to number and subject from previous surveys. However, the areas of typing; accounting/bookkeeping; recording, filing and records management; mailing; reprographics; information processing; shorthand; telephone; math and calculator skills; organization/time management; written/oral communication; grooming; health; human relations; and business knowledge skills were covered in the areas of specialized office employees, general office employees, bookkeeping/accounting employees, and computer and related employees.

The four last listed professions and an explanation of each are given below:

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1. Specialized office employees - this profession requires shorthand and other administrative skills and accepts additional responsibilities. Examples would include stenographers and secretaries.
2. General office employees - positions of this type would include typists, transcribing machine operators, file clerks, various machine operators, mail clerks, time clerks, and receptionists.
3. Bookkeeping/accounting employees - these types of positions would include audit clerks, bookkeepers, cashiers, invoice control clerks, payroll clerks, posting clerks, and accounting clerks.
4. Computer and related area employees - positions in these areas would include persons who operate input and output equipment and perform programming tasks appropriate to their office. Computer operators and data entry operators would also be included.

Responses were received from the following Wyoming cities and towns:

Cheyenne
Powell
Lander
Laramie
Sheridan
Evanston
Torrington
Casper
Worland
Sundance
Green River
Rock Springs
Gillette
Greybull
Buffalo
Jackson
Thermopolis

The questionnaire was disseminated to 210 businesses across the State of Wyoming. The list of businesses was supplied by the Casper Chamber of Commerce. A total of 137 responses or 62.38 percent were received.

Even though a number of Wyoming cities and towns, notably Rawlins and Cody, were absent from the study, it may be assumed that the study is representative of the Wyoming business community. Also the return of 62.38 percent is quite satisfactory and allows for minimal sampling error.

As a result of the return, information was found which could have some effect on business education in the State of Wyoming. An example of the types of businesses can be found below:

1. savings & loan
2. medical center
3. real estate business
4. community college
5. Mountain Bell
6. law firms
7. USDA Forest Service
8. newspapers
9. oil well business
10. land surveyors
11. electronic firm
12. finance company
13. insurance company
14. consulting engineer
15. banks
16. drug store
17. electric association
18. travel agency
19. chain restaurants
20. construction companies
21. credit unions
22. office machine companies
23. equipment companies
24. light, fuel and power companies
25. collection agency
26. automobile company
27. television station
28. printing & stationary company
29. freight services

30. answering service
31. certified public accountants

As can be seen by the above types of businesses, the findings of this study are significant in that so many different types of businesses are represented. The size and breadth of businesses covered should be a consideration for further studies of this type.

All information received from the questionnaire was reported and statistically analyzed by two SPSS (Statistical Package for the Social Sciences) programs. The programs used were a frequency distribution and cross tabulation. All analyses were completed at the University of Wyoming.

The information found takes the form of a number of tables and is illustrated in the following narrative.

Specific Report by Competency

The specific report by competency illustrates the most important competencies in the four areas according to the businesses surveyed. All responses were rated as "required," "desired," or "unnecessary," according to the feeling of the person completing the survey.

This report asked questions of offices which employed specialized office employees, general office employees, bookkeeping/accounting employees, and computer and related areas. However, a number of businesses were not satisfied with this breakdown and added the following:

1. all four areas
2. specialized and general office
3. bookkeeper/computer operators

4. all areas but bookkeeping
5. bookkeeping/general office employees

Also, of the 131 responses received, on 98 or 73.13 percent of the respondents answered the questions relative to position. Of those businesses answering the position question, 85 percent did fall within the four categories given by the questionnaire. (See Table I)

TABLE I

Positions Held by Respondents

OCCUPATION	NUMBER	PERCENTAGE
Specialized office	25	26
General office	28	29
Bookkeeping/accounting	24	24
Computer & related areas	6	6
All areas	7	7
Specialized & general office	2	2
Bookkeeper/computer	2	2
All but bookkeeping	1	1
Bookkeeping/general office	3	3
TOTALS	98	100

It is interesting to note that the three areas given greatest import were specialized office, general office, and bookkeeping/accounting. Computer and related occupied only six percent of use as reported by all respondents. It is further interesting to report that work positions as shown by the above table are changing and that individuals may now be combining computers and bookkeeping, computers and general office work, or all areas. For the purposes of this report all additional areas, as listed above, will be handled as "other" as the overall percentage is too small--15 percent--to have great significance to the report.

Report

This report will cover the major topics as specified in the questionnaire by area. Table II indicates importance given to typing skills in each question asked and for each skill area. As would be expected, the highest rating of 84 percent was given for specialized office in the area of typing and correcting business letters and envelopes. Correct typing skills were most important for general office workers (95%) and the same applied to bookkeepers/accountants (46%). Computer and related required proficiency in proofreading and ability to type numbers (both 67%) and all other areas also required proofreading skills.

Table III deals with accounting/bookkeeping skills. Bookkeeping/accounting gives the greatest import to posting entries from the general journal to the general ledger (75%). While all other areas felt recording transactions in the general journal was most important (79%). This area was not considered important in the office or computer areas.

Table IV presents recording, filing, records management skills and is reported below. Specialized office, general office, computer and related, and all other areas gave required rating of 70 to 80 percent to most of the questions in this category. Save for bookkeeping/accounting,

TABLE II
Typing Skills

QUESTION	NEED	SPECIALIZED OFFICE #	SPECIALIZED OFFICE %	GENERAL OFFICE #	GENERAL OFFICE %	BOOKKEEPING/ ACCOUNTING #	BOOKKEEPING/ ACCOUNTING %	COMPUTER RELATED #	COMPUTER RELATED %	ALL OTHER #	ALL OTHER %
1. Demonstrate correct typing skills.	Required	20	80	21	75	11	46	3	50	11	73
	Desired	4	16	6	21	10	42	3	50	4	27
	Unnecessary	1	4	1	4	3	12	0	0	0	0
2. Identify operative parts of a typewriter and their operations	Required	14	56	8	29	8	33	2	33	4	27
	Desired	7	28	10	36	6	25	2	33	8	53
	Unnecessary	4	16	10	36	10	42	2	33	3	20
3. Demonstrate speed and accuracy in typing straight copy.	Required	20	80	16	57	10	42	4	67	9	60
	Desired	3	12	10	36	6	25	1	17	5	33
	Unnecessary	2	8	2	7	8	33	1	17	1	7
4. Type and correct business letters and envelopes.	Required	21	84	21	75	8	33	2	33	10	67
	Desired	3	12	6	21	11	46	3	50	4	27
	Unnecessary	1	4	1	4	5	21	1	17	1	6
5. Type interoffice memoranda.	Required	19	76	12	43	7	29	2	33	7	47
	Desired	5	20	11	39	8	33	4	67	3	20
	Unnecessary	1	4	5	18	9	38	0	0	5	33
6. Type and correct tabulated information.	Required	19	76	12	43	8	33	3	50	10	67
	Desired	5	20	13	46	7	29	3	50	3	20
	Unnecessary	1	4	3	11	9	38	0	0	2	13
7. Chain feed, type, and correct address on envelopes.	Required	10	40	10	36	2	8	1	17	3	21
	Desired	6	24	10	36	8	33	2	33	5	36
	Unnecessary	9	36	8	28	14	58	3	50	6	43
8. Demonstrate problem solving and creativity in establishing headings, charts, boxed information, capitalization and italics, etc. from copy.	Required	15	60	8	31	6	25	3	50	7	47
	Desired	7	28	11	42	7	29	2	33	4	27
	Unnecessary	3	12	7	27	11	46	1	17	4	27
9. Demonstrate proficiency in typing numbers.	Required	17	68	16	57	10	42	4	67	11	73
	Desired	6	24	10	36	9	38	2	33	4	27
	Unnecessary	2	8	2	7	5	20	0	0	0	0

QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
10. Demonstrate proofreading skills.	Required	21	84	17	61	9	38	4	67	12	80
	Desired	4	16	11	39	8	33	2	33	3	20
	Unnecessary	0	0	0	0	7	24	0	0	0	0

*All percentages in this and all succeeding tables refer to the percent of those people answering in that one specific are only. Example: Only 6 firms answered question one in computer and related. Fifty percent required correct typing skills 50 percent desired correct typing skills. The percentage column has been rounded for ease in reporting.

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TABLE III
Accounting/Bookkeeping Skills

QUESTION	NEED	SPECIALIZED OFFICE #	SPECIALIZED OFFICE %	GENERAL OFFICE #	GENERAL OFFICE %	BOOKKEEPING/ ACCOUNTING #	BOOKKEEPING/ ACCOUNTING %	COMPUTER RELATED #	COMPUTER RELATED %	ALL OTHER #	ALL OTHER %
1. Record transactions in general journal.	Required	6	26	8	29	20	83	2	33	11	79
	Desired	4	17	7	25	0	0	2	33	1	7
	Unnecessary	13	57	13	46	4	17	2	33	2	14
2. Post entries from general journal to the general ledger.	Required	6	26	6	21	18	75	2	33	8	57
	Desired	3	13	7	25	3	13	2	33	3	21
	Unnecessary	14	61	15	54	3	13	2	33	3	21
3. Prepare a worksheet.	Required	8	35	5	19	14	58	2	33	5	35
	Desired	4	17	8	30	8	33	1	17	4	29
	Unnecessary	11	48	14	51	2	9	3	50	5	35
4. Prepare an income statement.	Required	6	26	2	7	12	50	2	33	7	50
	Desired	3	13	9	32	6	25	1	17	2	14
	Unnecessary	14	61	17	61	6	25	3	50	5	36
5. Prepare a capital statement.	Required	5	22	1	4	11	46	2	33	6	43
	Desired	4	17	9	32	7	29	1	17	2	14
	Unnecessary	14	61	18	64	6	25	3	50	6	43
6. Prepare a balance sheet.	Required	7	30	5	18	12	50	2	33	7	50
	Desired	3	13	7	25	5	21	1	17	2	14
	Unnecessary	13	57	16	57	7	29	3	50	5	36
7. Journalize and post adjusting entries.	Required	6	26	7	25	17	71	2	33	8	57
	Desired	3	13	6	21	5	21	2	33	2	14
	Unnecessary	14	61	15	54	2	8	2	33	4	29
8. Journalize and post closing entries.	Required	5	22	7	25	16	67	2	33	7	50
	Desired	4	17	6	21	5	21	2	33	2	14
	Unnecessary	14	61	15	54	3	12	2	33	5	36
9. Prepare a post-closing trial balance.	Required	5	22	4	14	13	54	2	40	6	43
	Desired	6	26	8	29	3	13	1	20	2	14
	Unnecessary	12	52	16	57	8	33	2	40	6	43

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TABLE IV

Recording, Filing, Records Management

QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
1. Index, code, sort, and file alphabetically.	Required	20	80	23	82	15	63	5	83	13	87
	Desired	5	20	5	18	7	29	1	17	2	13
	Unnecessary	0	0	0	0	2	8	0	0	0	0
2. Code, sort, and file numerically.	Required	18	72	23	82	15	63	5	83	11	73
	Desired	5	20	4	14	7	29	1	17	2	13
	Unnecessary	2	8	1	4	2	8	0	0	2	13
3. Retrieve material from the file; complete an out card and record.	Required	18	72	20	71	9	38	5	83	7	47
	Desired	5	20	5	18	10	42	1	17	4	27
	Unnecessary	2	8	3	11	5	20	0	0	4	27

no area listed as unnecessary indexing, coding, sorting and filing alphabetically.

The information covered in Table V involved mailing skills. As far as business is concerned, the most important aspect of mailing skills for specialized office workers were expected to be most aware of processing outgoing mail although incoming mail and forwarding mail was given high import. Neither specialized or general office were required to make decisions on best mail service. All other areas did process incoming mail (80%) but bookkeeping/accounting and computer and related made little use of mail service.

Table VI was concerned with reprograhpic skills. Little import was attached to the area of reprographics according to the findings of the study. Only one area, desired on computer and related/identifying characteristics was given a 67 percent rating.

Information processing skills are covered in Table VII. Surprisingly, information processing skills held little import for business with the exception of computer and related. Here the only question deemed of less import was the question involving software packages. Three questions were given an importance rating of 100 percent on required for computer and related.

The information presented in Table VIII covers shorthand skills. According to the findings of this study, shorthand carries little importance in either specialized or general office. The highest percentage given either required or desired was a 43 percent rating. Shorthand was listed as unnecessary by 41 percent to 50 percent of the respondents.

TABLE V
Mailing Skills

QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
1. Make decisions on best mail service.	Required	17	68	10	36	6	25	1	17	7	47
	Desired	5	20	12	43	10	42	1	17	4	27
	Unnecessary	3	12	6	21	8	33	4	66	4	27
2. Process incoming mail.	Required	18	72	18	64	11	46	1	17	12	80
	Desired	5	20	8	29	6	25	2	33	2	13
	Unnecessary	2	8	2	7	7	29	3	50	1	7
3. Process outgoing mail and maintain a mailing list.	Required	16	64	20	71	11	46	2	33	11	73
	Desired	7	28	6	21	7	29	2	33	2	13
	Unnecessary	2	8	2	7	6	25	2	33	2	13
4. Forward mail.	Required	16	64	16	57	11	46	1	17	8	53
	Desired	5	20	8	29	4	17	1	17	2	13
	Unnecessary	4	16	4	14	9	38	4	68	5	33

TABLE VI
Reprographics Skills

QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
1. Identify characteristics of copying/duplicating methods.	Required	11	44	11	39	9	38	0	0	6	40
	Desired	10	40	13	46	7	29	4	67	3	20
	Unnecessary	4	16	4	14	8	33	2	33	6	40
2. Make decisions on best copying/duplicating method to use.	Required	12	48	8	29	7	29	1	17	6	40
	Desired	8	32	11	39	5	21	1	17	2	13
	Unnecessary	5	20	9	32	12	50	4	66	7	47
3. Type, correct, and run spirit masters, stencils, etc.	Required	9	36	6	21	2	8	1	17	2	13
	Desired	4	16	7	25	2	8	0	0	3	20
	Unnecessary	12	48	15	54	20	84	5	83	10	67

TABLE VII
Information Processing Skills

QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
1. Demonstrate knowledge of computer terminology.	Required	9	36	4	14	11	46	5	83	9	60
	Desired	8	32	17	61	7	29	1	17	3	20
	Unnecessary	8	32	7	25	6	25	0	0	3	20
2. Enter data using the ten-key touch method.	Required	9	36	7	25	14	58	6	100	7	47
	Desired	9	36	9	32	4	17	0	0	4	27
	Unnecessary	7	28	12	3	27	25	0	0	3	20
3. Demonstrate correct keyboard technique.	Required	12	48	8	29	15	63	5	83	8	53
	Desired	6	24	13	46	4	17	1	17	4	27
	Unnecessary	7	28	7	20	6	25	0	0	3	20
4. Revise and correct entered information.	Required	12	48	12	43	13	54	6	100	11	73
	Desired	9	36	9	32	5	21	0	0	2	13
	Unnecessary	4	16	7	25	6	25	0	0	2	13
5. Output data to a printer and retrieve document.	Required	10	40	10	36	10	42	6	100	10	67
	Desired	9	36	9	32	6	25	0	0	2	13
	Unnecessary	6	24	9	32	8	33	0	0	3	20
6. Demonstrate beginning and exit procedures using a computer terminal.	Required	11	46	10	36	12	50	5	83	8	57
	Desired	8	33	11	39	6	25	1	17	2	14
	Unnecessary	5	21	7	25	6	25	0	0	4	29
7. Project the result of running a computer program.	Required	5	20	3	11	4	17	5	83	6	40
	Desired	8	32	10	36	6	25	1	17	4	27
	Unnecessary	12	48	15	53	14	58	0	0	5	33
8. Evaluate software packages for business applications such as accounting sub-systems or word processing.	Required	3	12	1	4	2	8	2	33	1	7
	Desired	8	32	8	29	7	29	3	50	6	40
	Unnecessary	14	56	19	67	15	63	1	17	8	53

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TABLE VIII
Shorthand Skills

QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
1. Take and accurately transcribe dictation of letters, memos, reports.	Required	6	25	2	7	3	13	0	0	4	27
	Desired	7	29	12	43	3	13	2	33	5	33
	Unnecessary	11	46	14	50	17	74	4	67	6	40
2. Edit, proofread and correct transcribed dictations.	Required	10	42	3	11	5	22	0	0	4	27
	Desired	4	17	11	39	2	9	2	33	7	47
	Unnecessary	10	42	14	50	16	69	4	67	4	27

Telephone skills are covered in Table IX. Telephone skills of all types were considered important to all respondents. The only exception was computer and related on the final question. Although placing telephone calls and demonstrating follow through was give a 67 percent desired rating it received a zero percent required rate.

Table X covered math and calculator skills. The information in Table X deals exclusively with math and calculator skills and is important to bookkeeping and accounting. However, nine question are rated very low in terms of required functions of workers. These nine questions deal with converting fractions to decimals (44%), converting decimals to fractions (44%), converting improper fractions to mixed numbers (39%). converting problems using the standard U.S. measure (22%), solving commission problems (35%), solving mark-up problems (26%), solving mark down problems (22%), and solving compound interest problems (35%).

As far as computer related are concerned, many of these skills are desired but not required. Five times questions received a zero percent for required on computer and related. These skills rated highly with many of the questions pertaining to all other areas. The highest rating of required in the office skills was a 64 percent in solving math problems consisting of whole numbers in specialized office and solving math problems consisting of mixed numbers in the general office area.

Table XI reports organization/time management. The ability to organize was considered vital to all respondents as was the ability to set priorities (100%) for bookkeeping/accounting. None of the respondents considered recording merchandise to be of great importance to any of the jobs.

TABLE IX
Telephone Skills

QUESTION	NEED	SPECIALIZED OFFICE #	SPECIALIZED OFFICE %	GENERAL OFFICE #	GENERAL OFFICE %	BOOKKEEPING/ ACCOUNTING #	BOOKKEEPING/ ACCOUNTING %	COMPUTER RELATED #	COMPUTER RELATED %	ALL OTHER #	ALL OTHER %
1. Identify telephone services and types of call.	Required	16	64	19	68	13	57	1	17	12	80
	Desired	8	32	4	14	6	26	2	33	3	20
	Unnecessary	1	4	5	18	4	17	3	50	0	0
2. Locate telephone numbers.	Required	19	76	21	75	13	57	1	17	12	80
	Desired	5	20	5	18	9	39	4	67	3	20
	Unnecessary	1	4	2	7	1	4	1	17	0	0
3. Answer telephone and take accurate messages including verifying number and name.	Required	23	92	24	86	18	78	2	33	15	100
	Desired	2	8	4	14	3	13	3	50	0	0
	Unnecessary	0	0	0	0	2	9	1	17	0	0
4. Place telephone calls, demonstrating follow through until right person is contacted.	Required	21	84	21	75	15	65	0	0	12	80
	Desired	2	8	5	18	7	31	4	67	2	13
	Unnecessary	2	8	2	7	1	4	2	33	1	7

TABLE X
Math and Calculator Skills

QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
1. Solve math problems consisting of whole numbers using a ten-key machine.	Required	16	64	17	61	22	96	2	33	14	93
	Desired	5	20	6	21	0	0	4	68	0	0
	Unnecessary	4	16	5	18	1	4	0	0	1	7
2. Solve math problems consisting of decimal numbers using a ten-key machine.	Required	15	60	16	57	22	96	2	33	13	87
	Desired	6	24	7	25	0	0	3	50	0	0
	Unnecessary	4	16	5	18	1	4	1	17	2	13
3. Solve math problems consisting of mixed numbers using a ten-key machine.	Required	12	48	18	64	20	87	2	33	11	73
	Desired	7	28	6	21	2	9	3	50	3	20
	Unnecessary	6	24	4	14	1	4	1	17	1	7
4. Round numbers to designated decimal places.	Required	14	56	14	50	21	91	1	17	11	73
	Desired	5	20	7	25	1	4	3	50	4	27
	Unnecessary	6	24	7	25	1	4	2	33	0	0
5. Compute cash discounts.	Required	8	32	13	46	16	70	2	33	10	67
	Desired	5	20	3	11	1	4	2	33	0	0
	Unnecessary	12	48	12	43	6	26	2	33	5	33
6. Convert proper fractions to decimals.	Required	9	36	8	29	10	44	1	17	8	53
	Desired	9	36	7	25	7	30	3	50	6	40
	Unnecessary	7	28	13	46	6	26	2	33	1	7
7. Convert decimals to proper fractions.	Required	8	32	7	25	10	44	1	17	8	53
	Desired	10	40	7	25	6	26	3	50	3	20
	Unnecessary	7	28	14	50	7	30	2	33	4	27
8. Convert improper fractions to mixed numbers.	Required	6	24	6	21	9	39	1	17	4	27
	Desired	6	24	7	25	5	22	3	50	6	40
	Unnecessary	13	52	15	54	9	39	2	33	5	33
9. Convert mixed numbers to improper fractions.	Required	6	24	6	21	9	39	1	17	4	27
	Desired	5	20	6	21	4	17	3	50	6	40
	Unnecessary	14	56	16	57	10	44	2	33	5	33

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QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
10. Round mixed numbers to whole numbers.	Required	9	36	9	32	14	61	1	17	8	57
	Desired	6	24	10	36	5	22	3	50	5	36
	Unnecessary	10	40	9	32	4	17	2	33	1	7
11. Compute simple interest.	Required	9	36	9	32	15	65	1	17	4	29
	Desired	7	28	7	25	1	4	3	50	6	43
	Unnecessary	9	36	12	43	7	30	2	33	4	29
12. Convert problems using the standard U.S. of measure.	Required	1	4	1	4	5	22	1	17	4	27
	Desired	8	32	8	29	5	22	4	67	1	7
	Unnecessary	16	64	19	68	13	57	1	17	10	67
13. Prepare sales slip.	Required	6	25	12	43	14	61	0	0	7	47
	Desired	2	8	1	4	0	0	4	67	1	7
	Unnecessary	16	67	15	54	9	39	2	33	7	47
14. Solve commission problems.	Required	4	16	7	25	8	35	0	0	3	20
	Desired	2	8	3	11	2	9	4	67	2	13
	Unnecessary	19	76	18	64	13	57	2	33	10	67
15. Solve mark up problems.	Required	4	16	6	21	6	26	0	0	4	27
	Desired	4	16	6	21	4	17	4	67	2	13
	Unnecessary	17	68	16	57	13	57	2	33	9	60
16. Solve mark down problems.	Required	4	16	6	21	5	22	0	0	4	27
	Desired	3	12	6	21	4	17	4	67	2	13
	Unnecessary	18	72	16	57	14	61	2	33	9	60
17. Solve compound interest problems.	Required	3	12	5	18	8	35	0	0	4	27
	Desired	4	16	8	29	6	26	3	50	1	7
	Unnecessary	18	72	15	54	9	39	3	50	10	67
18. Complete an invoice.	Required	8	32	12	43	15	65	0	0	10	67
	Desired	5	20	5	18	2	9	4	67	1	7
	Unnecessary	12	48	11	39	6	26	2	33	4	27

TABLE XI
Organization/Time Management Skills

QUESTION	NEED	SPECIALIZED OFFICE #	SPECIALIZED OFFICE %	GENERAL OFFICE #	GENERAL OFFICE %	BOOKKEEPING/ ACCOUNTING #	BOOKKEEPING/ ACCOUNTING %	COMPUTER RELATED #	COMPUTER RELATED %	ALL OTHER #	ALL OTHER %
1. Organize work stations.	Required	23	92	21	75	20	87	4	67	14	93
	Desired	2	8	5	18	2	9	2	33	1	7
	Unnecessary	0	0	2	7	1	4	0	0	0	0
2. Set priorities.	Required	22	88	20	71	23	100	5	83	14	93
	Desired	3	12	7	25	0	0	1	17	1	7
	Unnecessary	0	0	1	4	0	0	0	0	0	0
3. Make travel arrangements and complete related documents and reports.	Required	14	56	7	25	8	35	0	0	7	47
	Desired	7	28	13	46	6	26	2	33	5	33
	Unnecessary	4	16	8	29	9	39	4	67	3	20
4. Maintain a desk calendar.	Required	20	80	18	64	18	78	2	33	9	60
	Desired	4	16	6	22	5	22	3	50	5	33
	Unnecessary	1	4	4	14	0	0	1	17	1	7
5. Maintain a tickler file.	Required	15	60	13	46	10	44	1	17	5	33
	Desired	8	32	12	43	9	39	4	67	4	27
	Unnecessary	2	8	3	11	4	17	1	17	6	40
6. Record merchandise or stock inventory.	Required	7	28	8	29	9	39	3	50	6	40
	Desired	6	24	7	25	4	17	3	50	3	20
	Unnecessary	12	48	13	46	10	44	0	0	6	40

Table XII deals with written/oral communication skills. Here, all areas were listed as important with the exception of certain questions pertaining to computers and related. Ability to communicate rated in the 90 percent area for many questions in the required position of reaction.

The information provided in Table XIII pertains to both grooming skills and health skills. Both grooming and health skills are considered to be vitally important by all respondents. To report otherwise would be like criticizing mom and apple pie however. So a high rating of required and desired would be expected.

Table XIV covers human relation skills. This table stressed the importance of human relation skills. Out of four questions, only two areas, general office and bookkeeping/accounting listed any behavior as unnecessary. All questions ranged from a high of 93 percent in required importance to a low-high of 52 percent required. This area is a most important area as far as the overall questionnaire is concerned.

Table XV reports business knowledge skills. Although business knowledge was considered to be important, it was not considered nearly as important as some other areas of the study. Many of the business knowledge skills were considered as unnecessary by the questionnaire respondents. There was one exception however. Computer related gave high import to all business knowledge with the exception of preparing an agenda for a meeting (66% unnecessary).

TABLE XII
Written/Oral Communication Skills

QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
1. Locate and record information found in a dictionary and other reference materials.	Required	18	72	17	63	9	38	3	50	8	53
	Desired	6	24	8	30	10	42	3	50	5	33
	Unnecessary	1	4	2	7	5	20	0	0	2	13
2. Spell and define words.	Required	21	84	21	78	14	58	3	50	11	73
	Desired	4	16	5	19	8	33	3	50	4	27
	Unnecessary	0	0	1	3	2	8	0	0	0	0
3. Find specific information in written material.	Required	17	68	15	56	12	50	4	67	8	53
	Desired	6	24	9	33	9	38	2	33	5	33
	Unnecessary	2	8	3	11	3	12	0	0	2	13
4. Write gramatically sound and complete sentences.	Required	22	88	22	82	16	67	2	33	13	87
	Desired	3	12	4	15	8	33	4	67	2	13
	Unnecessary	0	0	1	4	0	0	0	0	0	0
5. Write sentences with correct punctuation, capitalization, abbreviations and number.	Required	23	92	22	82	15	62	2	33	13	87
	Desired	2	8	3	11	9	38	4	67	2	13
	Unnecessary	0	0	2	7	0	0	0	0	0	0
6. Compose and write simple business letters.	Required	20	80	18	67	16	67	3	50	13	87
	Desired	5	20	7	26	8	33	3	50	2	13
	Unnecessary	0	0	2	7	0	0	0	0	0	0
7. Follow oral instructions.	Required	23	92	23	85	24	100	5	83	14	93
	Desired	2	8	4	15	0	0	1	17	1	7
	Unnecessary	0	0	0	0	0	0	0	0	0	0
8. Give oral instructions.	Required	13	52	18	67	14	58	4	67	8	53
	Desired	12	48	7	26	7	29	2	33	6	40
	Unnecessary	0	0	2	7	3	13	0	0	1	7
9. Demonstrate good listening skills.	Required	24	100	24	89	20	83	4	67	14	93
	Desired	0	0	3	11	4	17	2	33	1	7
	Unnecessary	0	0	0	0	0	0	0	0	0	0
10. Greet visitors and give them directions.	Required	20	80	22	79	16	70	3	50	12	80
	Desired	4	16	5	18	5	22	2	33	1	7
	Unnecessary	1	4	1	3	2	8	1	17	0	0

QUESTION	NEED	SPECIALIZED OFFICE #	SPECIALIZED OFFICE %	GENERAL OFFICE #	GENERAL OFFICE %	BOOKKEEPING/ ACCOUNTING #	BOOKKEEPING/ ACCOUNTING %	COMPUTER RELATED #	COMPUTER RELATED %	ALL OTHER #	ALL OTHER %
11. Speak clearly and accurately.	Required	23	92	23	85	20	83	3	50	14	93
	Desired	2	8	4	15	4	17	3	50	1	7
	Unnecessary	0	0	0	0	0	0	0	0	0	0
12. Introduce individuals and speakers.	Required	11	44	10	37	8	33	2	33	7	47
	Desired	9	36	8	30	9	38	2	33	2	13
	Unnecessary	5	20	9	33	7	29	2	33	6	40
13. Demonstrate legible handwriting.	Required	19	76	24	89	19	79	3	50	13	87
	Desired	5	20	3	11	5	21	3	50	2	13
	Unnecessary	1	4	0	0	0	0	0	0	0	0

TABLE XIII
Grooming Skills/Health Skills

QUESTION	NEED	SPECIALIZED OFFICE #	SPECIALIZED OFFICE %	GENERAL OFFICE #	GENERAL OFFICE %	BOOKKEEPING/ ACCOUNTING #	BOOKKEEPING/ ACCOUNTING %	COMPUTER RELATED #	COMPUTER RELATED %	ALL OTHER #	ALL OTHER %
1. Demonstrate good grooming habits.	Required	19	76	25	89	19	79	3	50	12	80
	Desired	6	24	2	7	5	21	3	50	3	20
	Unnecessary	0	0	1	4	0	0	0	0	0	0
2. Demonstrate good health habits.	Required	17	71	25	89	18	75	3	50	12	80
	Desired	7	29	2	7	6	29	3	50	3	20
	Unnecessary	0	0	1	4	0	0	0	0	0	0

TABLE XIV
Human Relations Skills

QUESTION	NEED	SPECIALIZED OFFICE #	SPECIALIZED OFFICE %	GENERAL OFFICE #	GENERAL OFFICE %	BOOKKEEPING/ ACCOUNTING #	BOOKKEEPING/ ACCOUNTING %	COMPUTER RELATED #	COMPUTER RELATED %	ALL OTHER #	ALL OTHER %
1. Display self-understanding and self-esteem.	Required	13	52	23	85	14	58	4	67	11	73
	Desired	12	48	4	15	10	42	2	33	4	27
	Unnecessary	0	0	0	0	0	0	0	0	0	0
2. Demonstrate positive personality traits for job performance.	Required	16	64	25	93	14	58	4	67	13	87
	Desired	9	36	2	7	10	42	2	33	2	13
	Unnecessary	0	0	0	0	0	0	0	0	0	0
3. Demonstrate appropriate personal conduct on the job.	Required	21	84	25	93	19	79	5	83	13	87
	Desired	4	16	2	7	5	21	1	17	2	13
	Unnecessary	0	0	0	0	0	0	0	0	0	0
4. Analyze and develop solutions to personal behavior problems on the job.	Required	15	60	16	62	11	46	3	50	8	53
	Desired	10	40	9	35	10	42	3	50	6	40
	Unnecessary	0	0	1	4	3	12	0	0	1	7

TABLE XV
Business Knowledge Skills

QUESTION	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
1. Prepare an agenda for a meeting.	Required	7	28	4	15	1	4	1	17	6	40
	Desired	9	36	13	48	12	50	1	17	3	20
	Unnecessary	9	36	10	37	11	46	4	66	6	40
2. Prepare goals and objectives.	Required	9	36	8	30	8	33	3	50	7	47
	Desired	10	40	12	44	10	42	3	50	5	33
	Unnecessary	6	24	7	26	6	25	0	0	3	20
3. Delegate work assignments in office pool.	Required	5	20	4	15	3	13	1	17	5	33
	Desired	13	52	15	56	10	42	4	67	7	47
	Unnecessary	7	28	8	29	11	45	1	17	3	20
4. Demonstrate an understanding of supply and demand.	Required	8	32	8	30	5	22	1	17	4	27
	Desired	10	40	11	40	11	48	5	83	6	40
	Unnecessary	7	28	8	30	7	30	0	0	5	33
5. Demonstrate an understanding of profit and loss.	Required	9	36	13	48	11	48	2	33	7	47
	Desired	11	44	10	37	10	44	4	67	4	27
	Unnecessary	5	20	4	15	2	8	0	0	4	27
6. Demonstrate an understanding of federal rules and regulations.	Required	6	24	12	44	7	30	1	17	7	47
	Desired	14	56	7	26	11	48	4	67	5	33
	Unnecessary	5	20	8	30	5	22	1	17	3	20
7. Demonstrate an understanding of free enterprise.	Required	5	20	8	30	8	35	1	17	5	33
	Desired	16	64	14	52	9	39	5	83	5	33
	Unnecessary	4	16	5	18	6	26	0	0	5	33
8. Demonstrate an understanding of the group decision-making process.	Required	7	28	11	41	7	30	2	33	6	40
	Desired	13	52	13	48	10	44	4	67	7	47
	Unnecessary	5	20	3	11	6	26	0	0	2	13

Summary:

The statistical information derived from this study should be of great value to educators involved in business education. A brief summary of some of the more pertinent information follows:

1. Shorthand does not seem to be as important to Wyoming employers as teachers have been led through training and experience to expect.
2. Typing skills are vitally important to all areas. Keyboarding and typing classes should be made available to all students--not just vocational students. In this area there are exceptions. Chain feeding does not seem to be as important as it once was, probably because of the computer. Tabulating material and the typing of numbers of all types is more important than ever before in all areas covered by the study.
3. Mailing skills and knowledge of handling mail are very important to all office areas.
4. Records management skills are important to all areas and more training should be accomplished in this area.
5. Reprographic skills seem to be relatively unimportant in this study's results. Please study Table VI on page 13.
6. Telephone communications are vital to all areas.
7. Math and calculator skills, although important, seem to not be as vital as they once were. Possibly this is a result of the computer being used to a greater extent in today's office, or possibly, the study asked the wrong questions.

8. Organization/time management skills are important to all areas. As always, written and oral communications skills are important to all areas surveyed. In some cases, they were most important.
9. Human relations skills are the one area given greater import than oral and written communications.
10. Each year the study is completed, it is surprising that business knowledges are not given greater import than the respondents provide. This year's report is little different in that respect. Possibly, a different approach needs to be initiated on questions involving business knowledge.

Recommendations

On the basis of the findings of this study the writer recommends the following:

1. One and two-year programs in shorthand be maintained. These courses are necessary despite the study findings. Possibly future studies should, in addition to asking if shorthand is used and how it is used in the business, ask how shorthand skills are used in original employment of both specialized and general office workers.
2. Some questions should have been devoted to machine transcription.
3. Additional courses should be added to secondary curriculums in records management.

4. That those things which business education has emphasized in the past such as dress, punctuality, initiative, and health-care be continued in the future.
5. That all schools teach a "capstone" course in final skill development, time management, career planning, work flow, communications--both oral and written--and developing the ability to work with people.
6. That additional work in Business English or communications be developed for the students.
7. That an understanding of the computer, word processing, and computer based accounting is vital to today's society and should be made a part of each business education program.
8. That we do not forget writing skills, speaking skills, telephone techniques, listening skills, and reading skills in the school curriculum.
9. Due to changes in the business would, possibly separate questionnaires on specialized/general office, bookkeeping/accounting, and computer and related be prepared for the future.
10. Much computer work done for business is probably done by businesses hired specifically for this skill. Our students should be trained to recognize this fact and to work with those services.
11. Our students must be trained in more than office work. They need to be skilled in word processing techniques, computers, computer based accounting and in all types of communications.

12. That future consideration be given to developing the "cluster" concept of education, that we not prepare students specifically for an occupation but give serious thought to preparing the student for a variety of entry level jobs.

A final recommendation would be for further, continuing research of this type involving wide cross-sections of the business world. Separate studies in business knowledge, communication, bookkeeping/accounting, computers and related, and office skills should be done. Only in this way can we determine the specifics which need to be taught in each of the areas suggested above.

APPENDIX A

WYOMING BUSINESS & EDUCATION STEERING COMMITTEE
—STEERING IN THE RIGHT DIRECTION
2608 East Riding Club Road
Cheyenne, WY 82009

DEAR BUSINESS REPRESENTATIVE:

This is the third cooperative effort by business/industry and education to help ensure appropriate training in Wyoming business education classrooms. Once again we have come to businesses requesting your assistance.

We would appreciate your completing one survey for one program area. If you would like to contribute in more than one program, please contact Dr. Barr for additional surveys. His telephone number is: 766-3275.

Address all questions and return the survey to:

Dr. Lowell Barr
Department of Vocational Education
College of Education
University of Wyoming 82071

The preceding two surveys have been used by business teachers to write current program guidelines. The material gained from the enclosed survey will be used this summer to update the current curriculum. YOUR INFORMATION WILL BE USED!

On behalf of the entire steering committee, I would like to thank you for your involvement in Wyoming business education students.

Sincerely,

Tom Hayes
Mr. Tom Hayes
Chairman

Enclosure

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DEPARTMENT OF VOCATIONAL EDUCATION
BOX 3374, UNIVERSITY STATION
LARAMIE, WY 82071

WYOMING BUSINESS AND OFFICE OCCUPATIONS SURVEY

CONTACT PERSON: ______________________________

NAME OF FIRM: ______________________________

ADDRESS: ______________________________

TELEPHONE NUMBER: ______________________________

POSITION: ______________________________
(Specialized, General, Bookkeeper/Accountant, Computer)

Specialized Office Employees:
Requires shorthand and other administrative skills and accepts additional responsibilities. Examples would be stenographer and secretary.

General Office:
Examples of positions would include typist, transcribing machine operator, file clerk, various machine operators, mail clerk, time clerk, and receptionist.

Bookkeeping/Accounting:
Examples of position would include audit clerk, bookkeeper, cashier, invoice control clerk, payroll clerk, posting clerk, and accounting clerk.

Computer and Related Areas:
Examples of positions would include individuals who operate input and output equipment and perform programming tasks appropriate to your office. Computer operators and data entry operators would also be included.

R for required tasks
D for desired tasks
U for unnecessary

TYPING SKILLS

R	D	U		
			1.	Demonstrate correct typing techniques
			2.	Identify operative parts of a typewriter and their operations
			3.	Demonstrate speed and accuracy in typing straight copy
			4.	Type and correct business letters and envelopes
			5.	Type interoffice memoranda
			6.	Type and correct tabulated information
			7.	Chain feed, type, and correct addresses on envelopes
			8.	Demonstrate problem solving and creativity in establishing headings, charts, boxed information, capitalization and italics, etc., from straight copy
			9.	Demonstrate proficiency in typing numbers
			10.	Demonstrate proofreading skills

R for required tasks
D for desired tasks
U for unnecessary

ACCOUNTING/BOOKKEEPING SKILLS

R	D	U	
			1. Record transactions in the general journal
			2. Post entries from the general journal to the general ledger
			3. Prepare a worksheet
			4. Prepare an income statement
			5. Prepare a capital statement
			6. Prepare a balance sheet
			7. Journalize and post adjusting entries
			8. Journalize and post closing entries
			9. Prepare a postclosing trial balance

RECORDING, FILING, RECORDS MANAGEMENT SKILLS

R	D	U	
			1. Index, code, sort, and file alphabetically
			2. Code, sort, and file numerically
			3. Retrieve materials from the file; complete an out card and checkout record

MAILING SKILLS

R	D	U	
			1. Make decisions on best mail services
			2. Process incoming mail
			3. Process outgoing mail and maintain a mailing list
			4. Forward mail

REPROGRAPHICS SKILLS

R	D	U	
			1. Identify characteristics of copying/duplicating methods
			2. Make decisions on best copying/duplicating method to use
			3. Type, correct, and run spirit masters, stencils, etc.

INFORMATION PROCESSING SKILLS

R	D	U	
			1. Demonstrate knowledge of computer terminology
			2. Enter data using the ten-key touch method
			3. Demonstrate correct keyboard techniques
			4. Revise and correct entered information
			5. Output data to a printer and retrieve document
			6. Demonstrate beginning and exit procedures using a computer terminal
			7. Project the result of running a computer program
			8. Evaluate software packages for business applications such as accounting sub-systems or word processing.

R for required tasks
D for desired tasks
U for unnecessary

SHORTHAND SKILLS

R	D	U	
☐	☐	☐	1. Take and accurately transcribe dictation of letters, memos, reports
☐	☐	☐	2. Edit, proofread, and correct transcribed dictations

TELEPHONE SKILLS

R	D	U	
☐	☐	☐	1. Identify telephone services and types of call
☐	☐	☐	2. Locate telephone numbers
☐	☐	☐	3. Answer telephone and take accurate messages including verifying telephone number and name
☐	☐	☐	4. Place telephone calls, demonstrating follow through until right person is contacted

MATH AND CALCULATOR SKILLS

R	D	U	
☐	☐	☐	1. Solve math problems consisting of whole numbers using a ten-key machine
☐	☐	☐	2. Solve math problems consisting of decimal numbers using a ten-key machine
☐	☐	☐	3. Solve math problems consisting of mixed numbers using a ten-key machine
☐	☐	☐	4. Round numbers to designated decimal places
☐	☐	☐	5. Compute cash discounts
☐	☐	☐	6. Convert proper fractions to decimals
☐	☐	☐	7. Convert decimals to proper fractions
☐	☐	☐	8. Convert improper fractions to mixed numbers
☐	☐	☐	9. Convert mixed numbers to improper fractions
☐	☐	☐	10. Round mixed numbers to whole numbers
☐	☐	☐	11. Compute simple interest
☐	☐	☐	12. Convert problems using the standard U.S. unit of measure and the metric unit of measure
☐	☐	☐	13. Prepare sales slip
☐	☐	☐	14. Solve commission problems
☐	☐	☐	15. Solve markup problems
☐	☐	☐	16. Solve markdown problems
☐	☐	☐	17. Solve compound interest problems
☐	☐	☐	18. Complete an invoice

ORGANIZATION/TIME MANAGEMENT SKILLS

R	D	U	
☐	☐	☐	1. Organize work station
☐	☐	☐	2. Set priorities
☐	☐	☐	3. Make travel arrangements and complete related documents and reports
☐	☐	☐	4. Maintain a desk calendar
☐	☐	☐	5. Maintain a tickler file
☐	☐	☐	6. Record merchandise or stock inventory

R for required tasks
D for desired tasks
U for unnecessary

WRITTEN/ORAL COMMUNICATION SKILLS

R	D	U	
☐	☐	☐	1. Locate and record information found in a dictionary and other reference materials
☐	☐	☐	2. Spell and define words
☐	☐	☐	3. Find specific information in written material
☐	☐	☐	4. Write grammatically sound and complete sentence
☐	☐	☐	5. Write sentences with correct punctuation, capitalization, abbreviations, and numbers
☐	☐	☐	6. Compose and write simple business letters
☐	☐	☐	7. Follow oral instruction
☐	☐	☐	8. Give oral instruction
☐	☐	☐	9. Demonstrate good listening skills
☐	☐	☐	10. Greet visitors and give them directions
☐	☐	☐	11. Speak clearly and accurately
☐	☐	☐	12. Introduce individuals and speakers
☐	☐	☐	13. Demonstrate legible handwriting

GROOMING SKILLS

R	D	U	
☐	☐	☐	1. Demonstrate good grooming habits

HEALTH SKILLS

R	D	U	
☐	☐	☐	1. Demonstrate good health habits

HUMAN RELATIONS SKILLS

R	D	U	
☐	☐	☐	1. Display self-understanding and self-esteem
☐	☐	☐	2. Demonstrate positive personality traits for job performance
☐	☐	☐	3. Demonstrate appropriate personal conduct on the job
☐	☐	☐	4. Analyze and develop solutions to personal behavior problems on a job

BUSINESS KNOWLEDGE SKILLS

R	D	U	
☐	☐	☐	1. Prepare an agenda for a meeting
☐	☐	☐	2. Prepare goals and objectives
☐	☐	☐	3. Delegate work assignments in office pool
☐	☐	☐	4. Demonstrate an understanding of supply and demand
☐	☐	☐	5. Demonstrate an understanding of profit and loss
☐	☐	☐	6. Demonstrate an understanding of federal rules and regulations
☐	☐	☐	7. Demonstrate an understanding of free enterprise
☐	☐	☐	8. Demonstrate an understanding of the group decision making process

APPENDIX B

[illegible]
BUSINESS EDUCATION
DISTRIBUTIVE EDUCATION
DRIVER & SAFETY EDUCATION
HOME ECONOMICS EDUCATION
INDUSTRIAL ARTS EDUCATION

[illegible]
(ELECTRONICS)
(MANUFACTURING)
OFFICE ADMINISTRATION
TRADE AND INDUSTRIAL EDUCATION
VOCATIONAL STUDIES

THE UNIVERSITY OF WYOMING
COLLEGE OF EDUCATION
DEPARTMENT OF VOCATIONAL EDUCATION
UNIVERSITY STATION, BOX 3374
LARAMIE, WYOMING 82071

March 6, 1984

Dear Business Representative:

In early February we asked you to complete a Wyoming Business and Office Occupations Survey. Since we have not heard from you we are taking the liberty of sending you a follow-up survey.

The results of this questionnaire, which we have sent to 230 other businesses across the State of Wyoming, are very important to Business Education. The survey will determine the educational direction of Business Education in the State of Wyoming for the next several years. Needless to say, we hope to receive as many responses from as many businesses in Wyoming as we can.

We hope that you will take time from your busy schedule to complete the enclosed questionnaire. A stamped return envelope is enclosed for your convenience. Remember, your response will truly be of help to Wyoming's Business Education program.

Sincerely yours,

Lowell L. Barr

Lowell L. Barr
Associate Professor
Business & Vocational Education

ah

Enclosure

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Competency Certificate

This is to certify that:

____

Achieved the performance levels acknowledged
on the reverse side for the program of

____

And is therefore recognized

This _____ *Day of* __________ , *19*___

____

____
Instructor

____
Administrator

MAJOR COMPETENCY AREAS

DIRECTIONS: Evaluate the Trainee using the rating scale below and check the appropriate number to indicate the degree of competency. The numerical ratings of 4, 3, 2, and 1 are not to represent the traditional school grading system of A, B, C, and D. The descriptions associated with each of the numbers focus on level of student performance for each of the tasks listed below.

RATING SCALE: 4 Skilled—can work independently with no supervision.
3 Moderately skilled—can perform job completely with limited supervision.
2 Limited skill—requires instruction and close supervision.
1 No exposure—no experience or knowledge in this area.

4	3	2	1	
___	___	___	___	Accounting/Bookkeeping
___	___	___	___	Grooming/Health
___	___	___	___	Human Relations
___	___	___	___	Information Processing
___	___	___	___	Mailing
___	___	___	___	Math/Calculator
___	___	___	___	Organization/Time Management
___	___	___	___	Recording, Filing, Records Management
___	___	___	___	Telephone
___	___	___	___	Typing
___	___	___	___	Written/Oral Communications

Student ratings on specific competencies evaluated during the course are available upon student's written request and/or by calling the instructor. Parent's or guardian's signature is necessary if student is under 18 years of age.

The assessments of coursework which follow are samples of tests which teachers may freely use, add to, or delete from based upon instructional units, course offerings, and teacher preference.

The Wyoming standards for Business Education and the following evaluation tools have been developed and compiled with the cooperation of Wyoming employers; WBEA; Business Education Steering Committee; University of Wyoming, Business Education Department; State Department of Education and the hard work of many business teachers in Wyoming. Special acknowledgements go to Sherri Lambert of Gillette and Roberta Derr of Laramie.

The tasks stressed throughout the Business Education Standards are based on a 50% or more response from employers stating a requirement for entry-level employment by business students in the four major categories. The results of these surveys have been included as divider pages preceding each area. Realizing reprogramming and shorthand did not receive a 50% or more response, it was felt by the evaluators that these subjects are still necessary for over-all quality business education.

The employers survey did not include an emphasis on specific high-tech areas. However, the following subjects should be stressed throughout the business curriculum when possible:

Electronic Mail
Data Files
Interoffice Networking
Telecommunications
Electronic Spreadsheets
Computerized Accounting
Data Base Management Systems
Business Graphics
Data Entry Skills

As technology continues to change in the business industry, teachers are encouraged to keep abreast in their field in order to offer students entry level skills. These standards will be reviewed and updated as necessary.

Sincerely,

The 1984 Committee

ACCOUNTING/BOOKKEEPING SKILLS

TASK	NEED	SPECIALIZED OFFICE #	SPECIALIZED OFFICE %	GENERAL OFFICE #	GENERAL OFFICE %	BOOKKEEPING/ ACCOUNTING #	BOOKKEEPING/ ACCOUNTING %	COMPUTER RELATED #	COMPUTER RELATED %	ALL OTHER #	ALL OTHER %
* 1. Record transactions in general journal.	Required	6	26	8	29	20	83	2	33	11	79
	Desired	4	17	7	25	0	0	2	33	1	7
	Unnecessary	13	57	13	46	4	17	2	33	2	14
* 2. Post entries from general journal to the general ledger.	Required	6	26	6	21	18	75	2	33	8	57
	Desired	3	13	7	25	3	13	2	33	3	21
	Unnecessary	14	61	15	54	3	13	2	33	3	21
* 3. Prepare a worksheet.	Required	8	35	5	19	14	58	2	33	5	35
	Desired	4	17	8	30	8	33	1	17	4	29
	Unnecessary	11	48	14	51	2	9	3	50	5	35
* 4. Prepare an income statement.	Required	6	26	2	7	12	50	2	33	7	50
	Desired	3	13	9	32	6	25	1	17	2	14
	Unnecessary	14	61	17	61	6	25	3	50	5	36
* 5. Prepare a capital statement.	Required	5	22	1	4	11	46	2	33	6	43
	Desired	4	17	9	32	7	29	1	17	2	14
	Unnecessary	14	61	18	64	6	25	3	50	6	43
* 6. Prepare a balance sheet.	Required	7	30	5	18	12	50	2	33	7	50
	Desired	3	13	7	25	5	21	1	17	2	14
	Unnecessary	13	57	16	57	7	29	3	50	5	36
* 7. Journalize and post adjusting entries.	Required	6	26	7	25	17	71	2	33	8	57
	Desired	3	13	6	21	5	21	2	33	2	14
	Unnecessary	14	61	15	54	2	8	2	33	4	29
* 8. Journalize and post closing entries.	Required	5	22	7	25	16	67	2	33	7	50
	Desired	4	17	6	21	5	21	2	33	2	14
	Unnecessary	14	61	15	54	3	12	2	33	5	36
* 9. Prepare a post-closing trial balance.	Required	5	22	4	14	13	54	2	40	6	43
	Desired	6	26	8	29	3	13	1	20	2	14
	Unnecessary	12	52	16	57	8	33	2	40	6	43

* Objective and test are written for this task.

COMPETENCY AREA: ACCOUNTING/BOOKKEEPING

TASK: Record transactions in the general journal

PERFORMANCE OBJECTIVE:

Given a blank general journal and 20 transactions consisting of 4 sale transactions, 4 purchase transactions, 4 cash receipt transactions, 4 cash payment transactions, and 4 general journal transactions, the student will record the transactions in the general journal. At least 19 of the 20 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

GENERAL JOURNAL COMPETENCY TEST

Instructions: Record the following transactions in the general journal. Omit explanations. B. J. Company, Bret James is the owner.

May
1 Sold merchandise on account to Roger Klaus, $240.
2 Purchased merchandise on account, Baldwin Co., $136.
3 Paid cash for repair of an office chair, $54.
4 Received cash for the sale of an old desk, $120.
5 Paid cash to owner for personal use, $250.
6 Purchased merchandise on account, Baker Equipment Co., $674.
7 Received cash from owner as additional investment, $1000.
8 Paid on account, Greentree Equipment Co., $350.
8 Purchased merchandise on account, Iverson Exports, $629.
9 Paid cash for telephone bill, $82.
9 Granted credit to Bob Booth for merchandise returned, $200.
10 Sold merchandise on account to Gaynor Inc., $530.
11 Sold merchandise on account to J. T. Wilson, $35.
12 Purchased merchandise on account, DeCores Imports, $789.
13 Received cash for week's sales, $800.
13 Returned merchandise to Baker Equipment Co., $28.
15 Recorded the employer's payroll tax liabilities for May 15 payroll. FICA Tax Payable $225.60; State Unemployment Tax Payable $101.52.
15 Received cash on account from J. T. Wilson, $35.
15 Purchased supplies on account, Laramy Supply Co., $75

Accounting Page 3

GENERAL JOURNAL

Page

	Date		Account Title	Post. Ref.	Debit	Credit	
1							1
2							2
3							3
4							4
5							5
6							6
7							7
8							8
9							9
10							10
11							11
12							12
13							13
14							14
15							15
16							16
17							17
18							18
19							19
20							20
21							21
22							22
23							23
24							24
25							25
26							26
27							27
28							28
29							29
30							30
31							31
32							32
33							33
34							34
35							35

COMPETENCY AREA: ACCOUNTING/BOOKKEEPING

TASK: Post entries from the general journal to the general ledger

PERFORMANCE OBJECTIVE:

Given a completed general journal and a general ledger, the student will post the entries from the general journal to the general ledger. All items must be posted correctly.

SAMPLE EVALUATION INSTRUMENT OR CHECK LIST: See the following pages

GENERAL JOURNAL

Page 12

Date		Account Title	Post. Ref.	Debit	Credit
Dec	5	Rent Expense		5 00 00	
		Cash			5 00 00
		Check No. 24			
	6	A. B. Thomas, Drawing		3 5 000	
		Cash			3 50 00
		Check No. 25			
	8	Accounts Payable		2 450	
		Purchase Return & Allowance			24 50
		Debit Memo No. 47			

GENERAL LEDGER

ACCOUNT Cash ACCOUNT NO.

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT

ACCOUNT Accounts Payable ACCOUNT NO.

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT

ACCOUNT A. B. Thomas, Drawing ACCOUNT NO.

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT

ACCOUNT Sales ACCOUNT NO.

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT

ACCOUNT Purchase Return and Allowance ACCOUNT NO.

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT

ACCOUNT Rent Expense ACCOUNT NO.

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT

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COMPETENCY AREA: ACCOUNTING/BOOKKEEPING

TASK: Prepare a worksheet

PERFORMANCE OBJECTIVE:

Given a set of ledgers and a blank worksheet form, the student will prepare either an 8-column or 10-column worksheet with 80% accuracy.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

Ins ctions: Prepare an 8-column worksheet using the eneral ledgers given to you on the following shee

		1	2	3	4	5	6	7	8	
	Account Title	Trial Balance		Adjustments		Income Statement		Balance Sheet		
		Debit	Credit	Debit	Credit	Debit	Credit	Debit	Credit	
1										1
2										2
3										3
4										4
5										5
6										6
7										7
8										8
9										9
10										10
11										11
12										12
13										13
14										14
15										15
16										16
17										17
18										18
19										19
20										20
21										21
22										22
23										23
24										24
25										25

Instructions: Using the general ledgers given to you, prepare a 10-column worksheet.

	ACCOUNT TITLE	ACCT. NO.	UNADJUSTED TRIAL BALANCE		ADJUSTMENTS		ADJUSTED TRIAL BALANCE		INCOME STATEMENT		BALANCE SHEET	
			DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
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33												
34												
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36												
37												
38												
39												
40												
41												

GENERAL LEDGER

ACCOUNT Cash ACCOUNT NO. 11

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓			9600 00	

ACCOUNT Accounts Receivable ACCOUNT NO. 12

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓			3048 00	

ACCOUNT Merchandise Inventory ACCOUNT NO. 13

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓			48600 00	

ACCOUNT Supplies ACCOUNT NO. 14

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓			727 00	

ACCOUNT Prepaid Insurance ACCOUNT NO. 15

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓			1025 00	

ACCOUNT Accounts Payable ACCOUNT NO. 21

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓				1000 00

ACCOUNT Steven Elder, Capital ACCOUNT NO. 31

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓				28500 00

ACCOUNT Steven Elder, Drawing ACCOUNT NO. 32

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓			500 00	

Source: South-western Publishing, Century 21 Accounting

GENERAL LEDGER

ACCOUNT Gregory Mayo, Capital ACCOUNT NO. 33

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓				27500 00

ACCOUNT Gregory Mayo, Drawing ACCOUNT NO. 34

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓			500 00	

ACCOUNT Income Summary ACCOUNT NO. 35

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT

ACCOUNT Sales ACCOUNT NO. 41

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓				12000 00

ACCOUNT Purchases ACCOUNT NO. 51

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓			3200 00	

ACCOUNT Insurance Expense ACCOUNT NO. 61

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT

ACCOUNT Salary Expense ACCOUNT NO. 62

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT
19-- Nov.	30	Balance	✓			180 00	

ACCOUNT Supplies Expense ACCOUNT NO. 63

DATE		ITEM	POST. REF.	DEBIT	CREDIT	BALANCE DEBIT	BALANCE CREDIT

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COMPETENCY AREA: ACCOUNTING/BOOKKEEPING

TASK: Prepare an income statement

PERFORMANCE OBJECTIVE:

Given a worksheet and a blank 3-column form, the student will prepare an income statement with 100% accuracy.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

Instructions: Prepare an income statement using the information found on this worksheet.

The Tog Shop
Work Sheet
For Month Ended December 31, 19—

	1	2	3	4	5	6	7	8
	Trial Balance		Adjustments		Income Statement		Balance Sheet	
Account Title	Debit	Credit	Debit	Credit	Debit	Credit	Debit	Credit
1 Cash	11,313.00						11,313.00	
2 Accounts Receivable	560.00						560.00	
3 Merchandise Inventory	66,640.00		(b) 73,400.00	(a) 66,640.00			73,400.00	
4 Supplies	491.00			(c) 281.00			210.00	
5 Prepaid Insurance	421.00			(d) 151.00			270.00	
6 Accounts Payable		2,597.00						2,597.00
7 Sales Tax Payable		871.00						871.00
8 Michi Saga, Capital		35,044.00						35,044.00
9 Michi Saga, Drawing	588.00						588.00	
10 Stephen Saga, Capital		35,044.00						35,044.00
11 Stephen Saga, Drawing	632.00						632.00	
12 Income Summary			(a) 66,640.00	(b) 73,400.00	66,640.00	73,400.00		
13 Sales		13,038.00				13,038.00		
14 Purchases	3,873.00				3,873.00			
15 Credit Card Fee Expense	132.00				132.00			
16 Insurance Expense			(d) 151.00		151.00			
17 Miscellaneous Expense	82.00				82.00			
18 Rent Expense	784.00				784.00			
19 Salary Expense	1,078.00				1,078.00			
20 Supplies Expense			(c) 281.00		281.00			
21	86,594.00	86,594.00	140,472.00	140,472.00	73,021.00	86,438.00	86,973.00	73,556.00
22 Net Income					13,417.00			13,417.00
23					86,438.00	86,438.00	86,973.00	86,973.00

Source: South-western Publishing, Century 21 Accounting, 3rd ed.

Instructions: Prepare an income statement using the information found on this worksheet.

Furniture Manor
Worksheet
For the Month Ended June 30, 19–

	ACCOUNT TITLE	ACCT. NO.	TRIAL BALANCE		ADJUSTMENTS		ADJ. TRIAL BALANCE		INCOME STATEMENT		BALANCE SHEET		
			DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	
1	Cash	101	5,654 48				5,654 48				5,654 48		1
2	Petty Cash	102	40 00				40 00				40 00		2
3	Change Fund	103	30 00				30 00				30 00		3
4	Accounts Receivable	111	1,618 50				1,618 50				1,618 50		4
5	Merchandise Inventory	112	26,012 00			(a) 1,502 00	24,510 00				24,510 00		5
6	Prepaid Insurance	113	2,400 00			(c) 200 00	2,200 00				2,200 00		6
7	Store Supplies on Hand	114	359 00			(b) 79 00	280 00				280 00		7
8	Land	121	7,700 00				7,700 00				7,700 00		8
9	Building	131	30,000 00				30,000 00				30,000 00		9
10	Equipment	132	17,160 00				17,160 00				17,160 00		10
11	Accounts Payable	211		1,775 00				1,775 00				1,775 00	11
12	Sales Tax Payable	216		340 14				340 14				340 14	12
13	Employee Income Taxes Payable	221		169 70				169 70				169 70	13
14	FICA Taxes Payable	222		163 80				163 80				163 80	14
15	Mortgage Payable	231		15,869 38				15,869 38				15,869 38	15
16	Marie Pulaski, Capital	301		69,678 12				69,678 12				69,678 12	16
17	Marie Pulaski, Drawing	302	290 00				290 00				290 00		17
18	Sales	401		8,544 09				8,544 09		8,544 09			18
19	Sales Returns and Allowances	402	65 00				65 00		65 00				19
20	Sales Discount	403	22 90				22 90		22 90				20
21	Purchases	501	3,555 00				3,555 00		3,555 00				21
22	Transportation In	502	15 00				15 00		15 00				22
23	Purchases Returns and Allow.	503		73 00				73 00		73 00			23
24	Purchases Discount	504		12 80				12 80		12 80			24
25	Cash Short and Over	511	4 50				4 50		4 50				25
26	Advertising Expense	512	8 00				8 00		8 00				26
27	Delivery Expense	513	124 40				124 40		124 40				27
28	Miscellaneous Expense	515	47 80				47 80		47 80				28
29	Payroll Taxes Expense	516	81 90				81 90		81 90				29
30	Salaries Expense	517	1,400 00				1,400 00		1,400 00				30
31	Telephone Expense	519	37 55				37 55		37 55				31
32			96,626 03	96,626 03									32
33	Income Summary	399			(a) 1,502 00		1,502 00		1,502 00				33
34	Store Supplies Expense	518			(b) 79 00		79 00		79 00				34
35	Insurance Expense	514			(c) 200 00		200 00		200 00				35
36					1,781 00	1,781 00	96,626 03	96,626 03	7,143 05	8,629 89	89,482 98	87,996 14	36
37										7,143 05			37
38	Net Income									1,486 84		1,486 84	38
39											89,482 98	89,482 98	39

COMPETENCY AREA: ACCOUNTING/BOOKKEEPING

TASK: Prepare a capital statement

PERFORMANCE OBJECTIVE:

Given a worksheet and a blank 3-column form, the student will prepare a capital statement with 100% accuracy.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

Instructions: From the given worksheet, prepare a capital statement.

The Tog Shop
Work Sheet
For Month Ended December 31, 19—

		1	2	3	4	5	6	7	8	
		Trial Balance		Adjustments		Income Statement		Balance Sheet		
	Account Title	Debit	Credit	Debit	Credit	Debit	Credit	Debit	Credit	
1	Cash	11,313.00						11,313.00		1
2	Accounts Receivable	560.00						560.00		2
3	Merchandise Inventory	66,640.00		(b) 73,400.00	(a) 66,640.00			73,400.00		3
4	Supplies	491.00			(c) 281.00			210.00		4
5	Prepaid Insurance	421.00			(d) 151.00			270.00		5
6	Accounts Payable		2,597.00						2,597.00	6
7	Sales Tax Payable		871.00						871.00	7
8	Michi Saga, Capital		35,044.00						35,044.00	8
9	Michi Saga, Drawing	588.00						588.00		9
10	Stephen Saga, Capital		35,044.00						35,044.00	10
11	Stephen Saga, Drawing	632.00						632.00		11
12	Income Summary			(a) 66,640.00	(b) 73,400.00	66,640.00	73,400.00			12
13	Sales		13,038.00				13,038.00			13
14	Purchases	3,873.00				3,873.00				14
15	Credit Card Fee Expense	132.00				132.00				15
16	Insurance Expense			(d) 151.00		151.00				16
17	Miscellaneous Expense	82.00				82.00				17
18	Rent Expense	784.00				784.00				18
19	Salary Expense	1,078.00				1,078.00				19
20	Supplies Expense			(c) 281.00		281.00				20
21		86,594.00	86,594.00	140,472.00	140,472.00	73,021.00	86,438.00	86,973.00	73,556.00	21
22	Net Income					13,417.00			13,417.00	22
23						86,438.00	86,438.00	86,973.00	86,973.00	23

Accounting Page 16

Source: South-western Publishing, Century 21 Accounting, 3rd ed.

Instructions: From the given worksheet, prepare a capital statement.

Furniture Manor
Worksheet
For the Month Ended June 30, 19–

	ACCOUNT TITLE	ACCT. NO.	TRIAL BALANCE		ADJUSTMENTS		ADJ. TRIAL BALANCE		INCOME STATEMENT		BALANCE SHEET		
			DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	
1	Cash	101	5,654 48				5,654 48				5,654 48		1
2	Petty Cash	102	40 00				40 00				40 00		2
3	Change Fund	103	30 00				30 00				30 00		3
4	Accounts Receivable	111	1,618 50				1,618 50				1,618 50		4
5	Merchandise Inventory	112	26,012 00			(a) 1,502 00	24,510 00				24,510 00		5
6	Prepaid Insurance	113	2,400 00			(c) 200 00	2,200 00				2,200 00		6
7	Store Supplies on Hand	114	359 00			(b) 79 00	280 00				280 00		7
8	Land	121	7,700 00				7,700 00				7,700 00		8
9	Building	131	30,000 00				30,000 00				30,000 00		9
10	Equipment	132	17,160 00				17,160 00				17,160 00		10
11	Accounts Payable	211		1,775 00				1,775 00				1,775 00	11
12	Sales Tax Payable	216		340 14				340 14				340 14	12
13	Employee Income Taxes Payable	221		169 70				169 70				169 70	13
14	FICA Taxes Payable	222		163 80				163 80				163 80	14
15	Mortgage Payable	231		15,869 38				15,869 38				15,869 38	15
16	Marie Pulaski, Capital	301		69,678 12				69,678 12				69,678 12	16
17	Marie Pulaski, Drawing	302	290 00				290 00				290 00		17
18	Sales	401		8,544 09				8,544 09		8,544 09			18
19	Sales Returns and Allowances	402	65 00				65 00		65 00				19
20	Sales Discount	403	22 90				22 90		22 90				20
21	Purchases	501	3,555 00				3,555 00		3,555 00				21
22	Transportation In	502	15 00				15 00		15 00				22
23	Purchases Returns and Allow.	503		73 00				73 00		73 00			23
24	Purchases Discount	504		12 80				12 80		12 80			24
25	Cash Short and Over	511	4 50				4 50		4 50				25
26	Advertising Expense	512	8 00				8 00		8 00				26
27	Delivery Expense	513	124 40				124 40		124 40				27
28	Miscellaneous Expense	515	47 80				47 80		47 80				28
29	Payroll Taxes Expense	516	81 90				81 90		81 90				29
30	Salaries Expense	517	1,400 00				1,400 00		1,400 00				30
31	Telephone Expense	519	37 55				37 55		37 55				31
32			96,626 03	96,626 03									32
33	Income Summary	399			(a) 1,502 00		1,502 00		1,502 00				33
34	Store Supplies Expense	518			(b) 79 00		79 00		79 00				34
35	Insurance Expense	514			(c) 200 00		200 00		200 00				35
36					1,781 00	1,781 00	96,626 03	96,626 03	7,143 05	8,629 89	89,482 98	87,996 14	36
37										7,143 05			37
38	Net Income									1,486 84		1,486 84	38
39											89,482 98	89,482 98	39

Source: [illegible]

COMPETENCY AREA: ACCOUNTING/BOOKKEEPING

TASK: Prepare a balance sheet

PERFORMANCE OBJECTIVE:

Given a worksheet and a 3-column blank form, the student will prepare a balance sheet with 100% accuracy.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

Instructions: Prepare a balance sheet using the information on this worksheet.

The Tog Shop
Work Sheet
For Month Ended December 31, 19—

		1	2	3	4	5	6	7	8	
		Trial Balance		Adjustments		Income Statement		Balance Sheet		
	Account Title	Debit	Credit	Debit	Credit	Debit	Credit	Debit	Credit	
1	Cash	11,313.00						11,313.00		1
2	Accounts Receivable	560.00						560.00		2
3	Merchandise Inventory	66,640.00		(b) 73,400.00	(a) 66,640.00			73,400.00		3
4	Supplies	491.00			(c) 281.00			210.00		4
5	Prepaid Insurance	421.00			(d) 151.00			270.00		5
6	Accounts Payable		2,597.00						2,597.00	6
7	Sales Tax Payable		871.00						871.00	7
8	Michi Saga, Capital		35,044.00						35,044.00	8
9	Michi Saga, Drawing	588.00						588.00		9
10	Stephen Saga, Capital		35,044.00						35,044.00	10
11	Stephen Saga, Drawing	632.00						632.00		11
12	Income Summary			(a) 66,640.00	(b) 73,400.00	66,640.00	73,400.00			12
13	Sales		13,038.00				13,038.00			13
14	Purchases	3,873.00				3,873.00				14
15	Credit Card Fee Expense	132.00				132.00				15
16	Insurance Expense			(d) 151.00		151.00				16
17	Miscellaneous Expense	82.00				82.00				17
18	Rent Expense	784.00				784.00				18
19	Salary Expense	1,078.00				1,078.00				19
20	Supplies Expense			(c) 281.00		281.00				20
21		86,594.00	86,594.00	140,472.00	140,472.00	73,021.00	86,438.00	86,973.00	73,556.00	21
22	Net Income					13,417.00			13,417.00	22
23						86,438.00	86,438.00	86,973.00	86,973.00	23

Source: South-western Century 21, 3rd Edition

Instructions: Prepare a balance sheet using the information on this worksheet

Furniture Manor
Worksheet
For the Month Ended June 30, 19—

	ACCOUNT TITLE	ACCT. NO.	TRIAL BALANCE		ADJUSTMENTS		ADJ. TRIAL BALANCE		INCOME STATEMENT		BALANCE SHEET		
			DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	
1	Cash	101	5,654 48				5,654 48				5,654 48		1
2	Petty Cash	102	40 00				40 00				40 00		2
3	Change Fund	103	30 00				30 00				30 00		3
4	Accounts Receivable	111	1,618 50				1,618 50				1,618 50		4
5	Merchandise Inventory	112	26,012 00			(a) 1,502 00	24,510 00				24,510 00		5
6	Prepaid Insurance	113	2,400 00			(c) 200 00	2,200 00				2,200 00		6
7	Store Supplies on Hand	114	359 00			(b) 79 00	280 00				280 00		7
8	Land	121	7,700 00				7,700 00				7,700 00		8
9	Building	131	30,000 00				30,000 00				30,000 00		9
10	Equipment	132	17,160 00				17,160 00				17,160 00		10
11	Accounts Payable	211		1,775 00				1,775 00				1,775 00	11
12	Sales Tax Payable	216		340 14				340 14				340 14	12
13	Employee Income Taxes Payable	221		169 70				169 70				169 70	13
14	FICA Taxes Payable	222		163 80				163 80				163 80	14
15	Mortgage Payable	2[illegible]		15,869 38				15,869 38				15,869 38	15
16	Marie Pulaski, Capital	301		69,678 12				69,678 12				69,678 12	16
17	Marie Pulaski, Drawing	302	290 00				290 00				290 00		17
18	Sales	401		8,544 09				8,544 09		8,544 09			18
19	Sales Returns and Allowances	402	65 00				65 00		65 00				19
20	Sales Discount	403	22 90				22 90		22 90				20
21	Purchases	501	3,555 00				3,555 00		3,555 00				21
22	Transportation In	502	15 00				15 00		15 00				22
23	Purchases Returns and Allow.	503		73 00				73 00		73 00			23
24	Purchases Discount	504		12 80				12 80		12 80			24
25	Cash Short and Over	511	4 50				4 50		4 50				25
26	Advertising Expense	512	8 00				8 00		8 00				26
27	Delivery Expense	513	124 40				124 40		124 40				27
28	Miscellaneous Expense	515	47 60				47 80		47 80				28
29	Payroll Taxes Expense	516	81 90				81 90		81 90				29
30	Salaries Expense	517	1,400 00				1,400 00		1,400 00				30
31	Telephone Expense	519	37 55				37 55		37 55				31
32			96,626 03	96,626 03									32
33	Income Summary	399			(a) 1,502 00		1,502 00		1,502 00				33
34	Store Supplies Expense	518			(b) 79 00		79 00		79 00				34
35	Insurance Expense	514			(c) 200 00		200 00		200 00				35
36					1,781 00	1,781 00	96,626 03	96,626 03	7,143 05	8,629 89	89,482 98	87,996 14	36
37										7,143 05			37
38	Net Income									1,486 84		1,486 84	38
39											89,482 98	89,482 98	39

COMPETENCY AREA: ACCOUNTING/BOOKKEEPING

TASK: Journalize and post adjusting entries

PERFORMANCE OBJECTIVE:

Given a completed worksheet, a general journal, and a general ledger, the student will record the adjusting entries to the general journal and post them to the appropriate accounts in the general ledger. All items must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages.

*Evaluation instruments are included for the South-Western text and the Gregg/McGraw-Hill text.

INSTRUCTIONS: From the given worksheet, record the adjusting entries in the general journal and post them to the appropriate accounts in the general ledger.

The Tog Shop
Work Sheet
For Month Ended December 31, 19—

		1	2	3	4	5	6	7	8	
		Trial Balance		Adjustments		Income Statement		Balance Sheet		
	Account Title	Debit	Credit	Debit	Credit	Debit	Credit	Debit	Credit	
1	Cash	11,313.00						11,313.00		1
2	Accounts Receivable	560.00						560.00		2
3	Merchandise Inventory	66,640.00		(b) 73,400.00	(a) 66,640.00			73,400.00		3
4	Supplies	491.00			(c) 281.00			210.00		4
5	Prepaid Insurance	421.00			(d) 151.00			270.00		5
6	Accounts Payable		2,597.00						2,597.00	6
7	Sales Tax Payable		871.00						871.00	7
8	Michi Saga, Capital		35,044.00						35,044.00	8
9	Michi Saga, Drawing	588.00						588.00		9
10	Stephen Saga, Capital		35,044.00						35,044.00	10
11	Stephen Saga, Drawing	632.00						632.00		11
12	Income Summary			(a) 66,640.00	(b) 73,400.00	66,640.00	73,400.00			12
13	Sales		13,038.00				13,038.00			13
14	Purchases	3,873.00				3,873.00				14
15	Credit Card Fee Expense	132.00				132.00				15
16	Insurance Expense			(d) 151.00		151.00				16
17	Miscellaneous Expense	82.00				82.00				17
18	Rent Expense	784.00				784.00				18
19	Salary Expense	1,078.00				1,078.00				19
20	Supplies Expense			(c) 281.00		281.00				20
21		86,594.00	86,594.00	140,472.00	140,472.00	73,021.00	86,438.00	86,973.00	73,556.00	21
22	Net Income					13,417.00			13,417.00	22
23						86,438.00	86,438.00	86,973.00	86,973.00	23

Source: Century 21, 3rd Ed., South-western Publishing

Directions: From the given worksheet, record the adjusting entries in the general journal, and post them to the appropriate accounts in the general ledger.

Furniture Manor
Worksheet
For the Month Ended June 30, 19–

	ACCOUNT TITLE	ACCT. NO.	TRIAL BALANCE		ADJUSTMENTS		ADJ. TRIAL BALANCE		INCOME STATEMENT		BALANCE SHEET		
			DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	
1	Cash	101	5,654 48				5,654 48				5,654 48		1
2	Petty Cash	102	40 00				40 00				40 00		2
3	Change Fund	103	30 00				30 00				30 00		3
4	Accounts Receivable	111	1,618 50				1,618 50				1,618 50		4
5	Merchandise Inventory	112	26,012 00			(a) 1,502 00	24,510 00				24,510 00		5
6	Prepaid Insurance	113	2,400 00			(c) 200 00	2,200 00				2,200 00		6
7	Store Supplies on Hand	114	359 00			(b) 79 00	280 00				280 00		7
8	Land	121	7,700 00				7,700 00				7,700 00		8
9	Building	131	30,000 00				30,000 00				30,000 00		9
10	Equipment	132	17,160 00				17,160 00				17,160 00		10
11	Accounts Payable	211		1,775 00				1,775 00				1,775 00	11
12	Sales Tax Payable	216		340 14				340 14				340 14	12
13	Employee Income Taxes Payable	221		169 70				169 70				169 70	13
14	FICA Taxes Payable	222		163 80				163 80				163 80	14
15	Mortgage Payable	231		15,869 38				15,869 38				15,869 38	15
16	Marie Pulaski, Capital	301		69,678 12				69,678 12				69,678 12	16
17	Marie Pulaski, Drawing	302	290 00				290 00				290 00		17
18	Sales	401		8,544 09				8,544 09		8,544 09			18
19	Sales Returns and Allowances	402	65 00				65 00		65 00				19
20	Sales Discount	403	22 90				22 90		22 90				20
21	Purchases	501	3,555 00				3,555 00		3,555 00				21
22	Transportation In	502	15 00				15 00		15 00				22
23	Purchases Returns and Allow.	503		73 00				73 00		73 00			23
24	Purchases Discount	504		12 80				12 80		12 80			24
25	Cash Short and Over	511	4 50				4 50		4 50				25
26	Advertising Expense	512	8 00				8 00		8 00				26
27	Delivery Expense	513	124 40				124 40		124 40				27
28	Miscellaneous Expense	515	47 80				47 80		47 80				28
29	Payroll Taxes Expense	516	81 90				81 90		81 90				29
30	Salaries Expense	517	1,400 00				1,400 00		1,400 00				30
31	Telephone Expense	519	37 55				37 55		37 55				31
32			96,626 03	96,626 03									32
33	Income Summary	399			(a) 1,502 00		1,502 00		1,502 00				33
34	Store Supplies Expense	518			(b) 79 00		79 00		79 00				34
35	Insurance Expense	514			(c) 200 00		200 00		200 00				35
36					1,781 00	1,781 00	96,626 03	96,626 03	7,143 05	8,629 89	89,482 98	87,996 14	36
37									→	7,143 05			37
38	Net Income									1,486 84	→	1,486 84	38
39											89,482 98	89,482 96	39

BEST COPY AVAILABLE

Source: Gregg/McGraw-Hill Accounting 10/12, 3rd E

GENERAL JOURNAL

Page

	Date	Account Title	Post. Ref.	Debit	Credit	
1						1
2						2
3						3
4						4
5						5
6						6
7						7
8						8
9						9
10						10
11						11
12						12
13						13
14						14
15						15
16						16
17						17
18						18
19						19
20						20
21						21
22						22
23						23
24						24
25						25
26						26
27						27
28						28
29						29
30						30
31						31
32						32
33						33
34						34
35						35

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

COMPETENCY AREA: ACCOUNTING/BOOKKEEPING

TASK: Journalize and post closing entries

PERFORMANCE OBJECTIVE:

Given a completed worksheet, a general journal, and a general ledger, the student will record the closing entries in the general journal and post them to the appropriate accounts in the general ledger. All items must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Evaluation instruments have been included for the South-Western text and the Gregg/McGraw-Hill text.

INSTRUCTIONS: From the given worksheet, record the closing entries in the general journal and post them to the appropriate accounts in the general ledger.

The Tog Shop
Work Sheet
For Month Ended December 31, 19—

		1	2	3	4	5	6	7	8	
		Trial Balance		Adjustments		Income Statement		Balance Sheet		
	Account Title	Debit	Credit	Debit	Credit	Debit	Credit	Debit	Credit	
1	Cash	11,313.00						11,313.00		1
2	Accounts Receivable	560.00						560.00		2
3	Merchandise Inventory	66,640.00		(b) 73,400.00	(a) 66,640.00			73,400.00		3
4	Supplies	491.00			(c) 281.00			210.00		4
5	Prepaid Insurance	421.00			(d) 151.00			270.00		5
6	Accounts Payable		2,597.00						2,597.00	6
7	Sales Tax Payable		871.00						871.00	7
8	Michi Saga, Capital		35,044.00						35,044.00	8
9	Michi Saga, Drawing	588.00						588.00		9
10	Stephen Saga, Capital		35,044.00						35,044.00	10
11	Stephen Saga, Drawing	632.00						632.00		11
12	Income Summary			(a) 66,640.00	(b) 73,400.00	66,640.00	73,400.00			12
13	Sales		13,038.00				13,038.00			13
14	Purchases	3,873.00				3,873.00				14
15	Credit Card Fee Expense	132.00				132.00				15
16	Insurance Expense			(d) 151.00		151.00				16
17	Miscellaneous Expense	82.00				82.00				17
18	Rent Expense	784.00				784.00				18
19	Salary Expense	1,078.00				1,078.00				19
20	Supplies Expense			(c) 281.00		281.00				20
21		86,594.00	86,594.00	140,472.00	140,472.00	73,021.00	86,438.00	86,973.00	73,556.00	21
22	Net Income					13,417.00			13,417.00	22
23						86,438.00	86,438.00	86,973.00	86,973.00	23

Source: South-western Publishing, Century 21 Accounting, 3rd Ed.

Directions: From the given worksheet, record the closing entries in the general journal and post them to the appropriate accounts in the general journal.

Furniture Manor
Worksheet
For the Month Ended June 30, 19–

ACCOUNT TITLE	ACCT. NO.	TRIAL BALANCE		ADJUSTMENTS		ADJ. TRIAL BALANCE		INCOME STATEMENT		BALANCE SHEET	
		DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT	DEBIT	CREDIT
Cash	101	5,654 48				5,654 48				5,654 48	
Petty Cash	102	40 00				40 00				40 00	
Change Fund	103	30 00				30 00				30 00	
Accounts Receivable	111	1,618 50				1,618 50				1,618 50	
Merchandise Inventory	112	26,012 00			(a) 1,502 00	24,510 00				24,510 00	
Prepaid Insurance	113	2,400 00			(c) 200 00	2,200 00				2,200 00	
Store Supplies on Hand	114	359 00			(b) 79 00	280 00				280 00	
Land	121	7,700 00				7,700 00				7,700 00	
Building	131	30,000 00				30,000 00				30,000 00	
Equipment	132	17,160 00				17,160 00				17,160 00	
Accounts Payable	211		1,775 00				1,775 00				1,775 00
Sales Tax Payable	216		340 14				340 14				340 14
Employee Income Taxes Payable	221		169 70				169 70				169 70
FICA Taxes Payable	222		163 80				163 80				163 80
Mortgage Payable	231		15,869 38				15,869 38				15,869 38
Marie Pulaski, Capital	301		69,678 12				69,678 12				69,678 12
Marie Pulaski, Drawing	302	290 00				290 00				290 00	
Sales	401		8,544 09				8,544 09		8,544 09		
Sales Returns and Allowances	402	65 00				65 00		65 00			
Sales Discount	403	22 90				22 90		22 90			
Purchases	501	3,555 00				3,555 00		3,555 00			
Transportation In	502	15 00				15 00		15 00			
Purchases Returns and Allow.	503		73 00				73 00		73 00		
Purchases Discount	504		12 80				12 80		12 80		
Cash Short and Over	511	4 50				4 50		4 50			
Advertising Expense	512	8 00				8 00		8 00			
Delivery Expense	513	124 40				124 40		124 40			
Miscellaneous Expense	515	47 80				47 80		47 80			
Payroll Taxes Expense	516	81 90				81 90		81 90			
Salaries Expense	517	1,400 00				1,400 00		1,400 00			
Telephone Expense	519	37 55				37 55		37 55			
		96,626 03	96,626 03								
Income Summary	399			(a) 1,502 00		1,502 00		1,502 00			
Store Supplies Expense	518			(b) 79 00		79 00		79 00			
Insurance Expense	514			(c) 200 00		200 00		200 00			
				1,781 00	1,781 00	96,626 03	96,626 03	7,143 05	8,629 89	89,482 98	87,996 14
									7,143 05		
Net Income									1,486 84		1,486 84
										89,482 98	89,482 98

Source: Gregg/McGraw-Hill, Accounting 10/12, 3rd Ed.

GENERAL JOURNAL

Page

	Date		Account Title	Post. Ref.	Debit	Credit	
1							1
2							2
3							3
4							4
5							5
6							6
7							7
8							8
9							9
10							10
11							11
12							12
13							13
14							14
15							15
16							16
17							17
18							18
19							19
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25							25
26							26
27							27
28							28
29							29
30							30
31							31
32							32
33							33
34							34
35							35

ACCOUNT ACCOUNT No.

Date	Item	Post. Ref.	Debit	Credit	Balance	
					Debit	Credit

ACCOUNT ACCOUNT No.

Date	Item	Post. Ref.	Debit	Credit	Balance	
					Debit	Credit

ACCOUNT ACCOUNT No.

Date	Item	Post. Ref.	Debit	Credit	Balance	
					Debit	Credit

ACCOUNT ACCOUNT No.

Date	Item	Post. Ref.	Debit	Credit	Balance	
					Debit	Credit

ACCOUNT No.

ACCOUNT

Date		Item	Post. Ref.	Debit	Credit	Balance	
						Debit	Credit

ACCOUNT No.

ACCOUNT

Date		Item	Post. Ref.	Debit	Credit	Balance	
						Debit	Credit

ACCOUNT No.

ACCOUNT

Date		Item	Post. Ref.	Debit	Credit	Balance	
						Debit	Credit

ACCOUNT No.

ACCOUNT

Date		Item	Post. Ref.	Debit	Credit	Balance	
						Debit	Credit

ACCOUNT ACCOUNT No.

Date	Item	Post. Ref.	Debit	Credit	Balance	
					Debit	Credit

ACCOUNT ACCOUNT No.

Date	Item	Post. Ref.	Debit	Credit	Balance	
					Debit	Credit

ACCOUNT ACCOUNT No.

Date	Item	Post. Ref.	Debit	Credit	Balance	
					Debit	Credit

ACCOUNT ACCOUNT No.

Date	Item	Post. Ref.	Debit	Credit	Balance	
					Debit	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

ACCOUNT ACCOUNT No.

Date	Item	P. R.	Debit	Date	Item	P. R.	Credit

COMPETENCY AREA: ACCOUNTING/BOOKKEEPING

TASK: Prepare a post-closing trial balance

PERFORMANCE OBJECTIVE:

Given a ledger and a 2-column blank form, the student will prepare a post-closing trial balance with 100% accuracy.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

Accounting Page 43

ACCOUNT *Cash* ACCOUNT NO. *11*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1	Balance	✓			420000	
30		2	1355120		1775120	
30		2		620700	1154420	

ACCOUNT *Accounts Receivable* ACCOUNT NO. *12*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1	Balance	✓			28600	
30		2	63960		92560	
30		2		35360	57200	

ACCOUNT *Merchandise Inventory* ACCOUNT NO. *13*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1	Balance	✓			6800000	
30		3		6800000	—	—
30		3	6400000		6400000	

ACCOUNT *Supplies* ACCOUNT NO. *14*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1	Balance	✓			16000	
10		1	14200		30200	
15		1	8600		38800	
17		1	8000		46800	
29		2	3300		50100	
30		3		26000	24100	

ACCOUNT *Prepaid Insurance* ACCOUNT NO. *15*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1	Balance	✓			43000	
30		3		7500	35500	

ACCOUNT *Accounts Payable* ACCOUNT NO. *21*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1	Balance	✓				120000
30		2	216400		96400	
30		2		361400		265000

ACCOUNT *Sales Tax Payable* ACCOUNT NO. *22*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1	Balance	✓				35680
30		2		53220		88900

ACCOUNT *Eva Burgos, Capital* ACCOUNT NO. *31*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1	Balance	✓				3575960
30		3		144950		3720910
30		3	60000			3660910

ACCOUNT *Eva Burgos, Drawing* ACCOUNT NO. *32*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 15		1	30000		30000	
30		2	30000		60000	
30		3		60000	—	—

ACCOUNT *Luis Perez, Capital* ACCOUNT NO. *33*

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1	Balance	✓				3575960
30		3		144950		3720910
30		3	64500			3656410

ACCOUNT *Luis Perez, Drawing* ACCOUNT NO.

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CRE
1982 Nov. 15		1	30000		30000	
16		1	4500		34500	
30		2	30000		64500	
30		3		64500	—	—

Source: South-western Publishing, Century 21 Accounting 3rd Ed.

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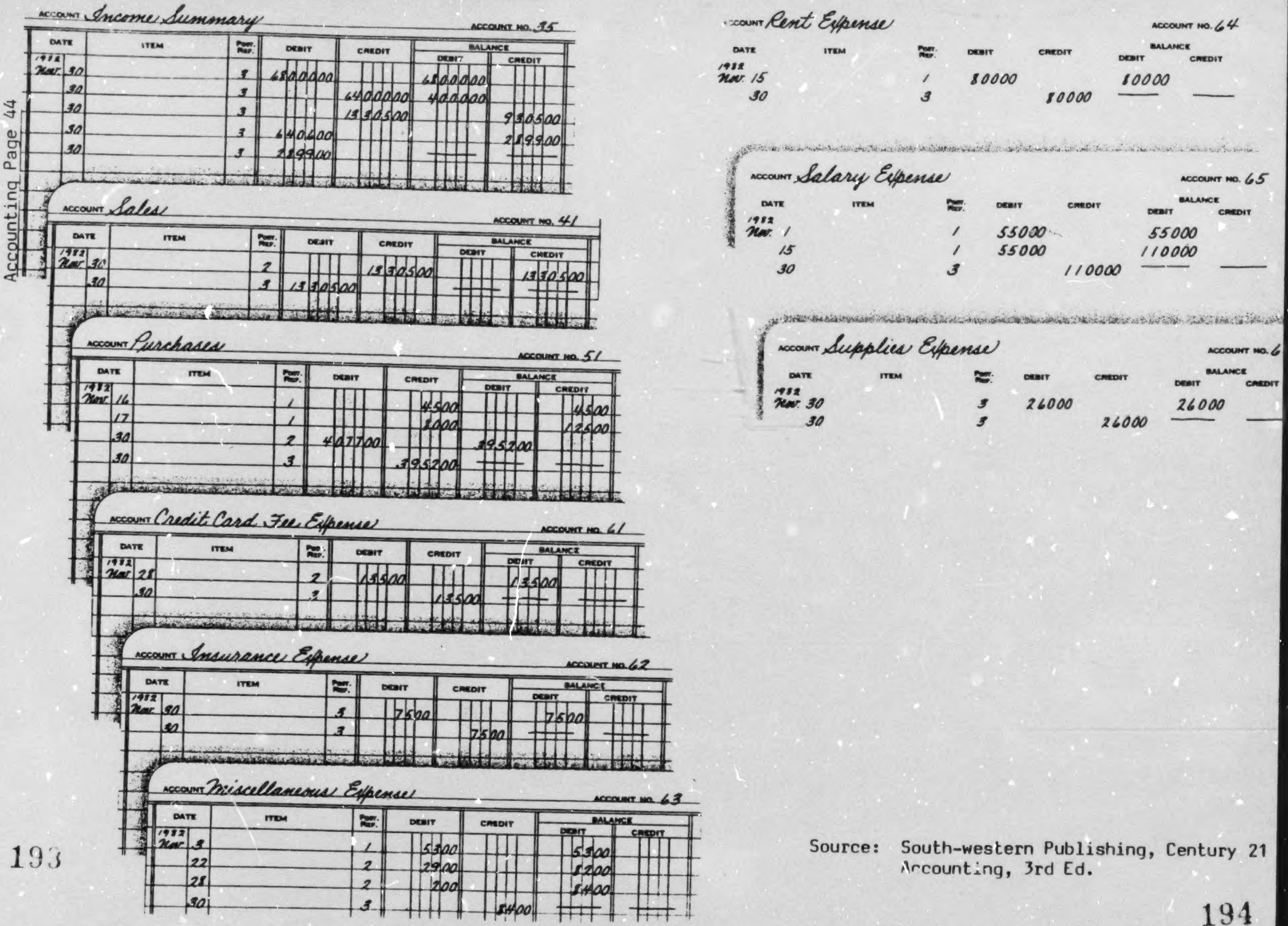

ACCOUNT *Income Summary* ACCOUNT NO. 35

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 30		3	6800000		6800000	
30		3		6400000	400000	
30		3		1330500		930500
30		3	640400			289900
30		3	289900		—	—

ACCOUNT *Sales* ACCOUNT NO. 41

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 30		2		1330500		1330500
30		3	1330500		—	—

ACCOUNT *Purchases* ACCOUNT NO. 51

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 16		1		4500		4500
17		1		8000		12500
30		2	407700		395200	
30		3		395200	—	—

ACCOUNT *Credit Card Fee Expense* ACCOUNT NO. 61

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 28		2	13500		13500	
30		3		13500	—	—

ACCOUNT *Insurance Expense* ACCOUNT NO. 62

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 30		3	7500		7500	
30		3		7500	—	—

ACCOUNT *Miscellaneous Expense* ACCOUNT NO. 63

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 3		1	5300		5300	
22		2	2900		8200	
28		2	200		8400	
30		3		8400	—	—

ACCOUNT *Rent Expense* ACCOUNT NO. 64

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 15		1	80000		80000	
30		3		80000	—	—

ACCOUNT *Salary Expense* ACCOUNT NO. 65

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 1		1	55000		55000	
15		1	55000		110000	
30		3		110000	—	—

ACCOUNT *Supplies Expense* ACCOUNT NO. 6

DATE	ITEM	POST. REF.	DEBIT	CREDIT	BALANCE	
					DEBIT	CREDIT
1982 Nov. 30		3	26000		26000	
30		3		26000	—	—

Source: South-western Publishing, Century 21 Accounting, 3rd Ed.

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GROOMING SKILLS/HEALTH SKILLS

GROOMING SKILLS/HEALTH SKILLS

TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
* 1. Demonstrate good grooming habits.	Required	19	76	25	89	19	79	3	50	12	80
	Desired	6	24	2	7	5	21	3	50	3	20
	Unnecessary	0	0	1	4	0	0	0	0	0	0
* 2. Demonstrate good health habits.	Required	17	71	25	89	18	75	3	50	12	80
	Desired	7	29	2	7	6	29	3	50	3	20
	Unnecessary	0	0	1	4	0	0	0	0	0	0

* Objective and test are written for this task.

COMPETENCY AREA: GROOMING/HEALTH SKILLS

TASK: Demonstrate good grooming habits

PERFORMANCE OBJECTIVE:

Given a checklist, the student will demonstrate good grooming habits. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page.

GROOMING CHECKLIST

	Acceptable	Unacceptable
Appropriate apparel		
Neat and clean apparel		
Personal hygiene		

COMPETENCY AREA: GROOMING/HEALTH SKILLS

TASK: Demonstrate good health habits

PERFORMANCE OBJECTIVE:

Given a checklist, the student will demonstrate good health habits. All items must be acceptable

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page.

*Note: Two excellent pamphlets are available for use in teaching this competency. They can be obtained from the State of Wyoming.

1. "What everyone should know about Wellness"
2. Health Style--a self test

State of Wyoming
Department of Health and Social Services
Division of Health and Medical Services
Health Risk Reduction Program
Hathaway Building
Cheyenne, WY 82002
(307) 777-6011

HEALTH CHECKLIST

	Acceptable	Unacceptable
1. Proper Diet		
2. Adequate Exercise		
3. Adequate Rest		
4. Control Stress		
5. Avoid Bad Habits		
6. Optimistic Attitude		

HUMAN RELATIONS SKILLS

TASK	NEED	SPECIALIZED OFFICE #	SPECIALIZED OFFICE %	GENERAL OFFICE #	GENERAL OFFICE %	BOOKKEEPING/ ACCOUNTING #	BOOKKEEPING/ ACCOUNTING %	COMPUTER RELATED #	COMPUTER RELATED %	ALL OTHER #	ALL OTHER %
* 1. Display self-understanding and self-esteem.	Required	13	52	23	85	14	58	4	67	11	73
	Desired	12	48	4	15	10	42	2	33	4	27
	Unnecessary	0	0	0	0	0	0	0	0	0	0
* 2. Demonstrate positive personality traits for job performance.	Required	16	64	25	93	14	58	4	67	13	87
	Desired	9	36	2	7	10	42	2	33	2	13
	Unnecessary	0	0	0	0	0	0	0	0	0	0
* 3. Demonstrate appropriate personal conduct on the job.	Required	21	84	25	93	19	79	5	83	13	87
	Desired	4	16	2	7	5	21	1	17	2	13
	Unnecessary	0	0	0	0	0	0	0	0	0	0
* 4. Analyze and develop solutions to personal behavior problems on the job.	Required	15	60	16	62	11	46	3	50	8	53
	Desired	10	40	9	35	10	42	3	50	6	40
	Unnecessary	0	0	1	4	3	12	0	0	1	7

* Objective and test are written for this task.

SPECIAL NOTE

Although human relations skills are very difficult to teach and even harder to evaluate, it should be noted that ALL businesses indicated a strong desire for human relations skills in their employees. The following checklist(s) are to be viewed as guidelines and individual teachers are encouraged to modify them according to local concerns and interests.

COMPETENCY AREA: HUMAN RELATIONS

TASK: Display self-understanding

PERFORMANCE OBJECTIVE:

Given a values assessment, the student will display self-understanding by completing the personal values profile in an acceptable manner.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

Two evaluation instruments have been provided for your use. The first one is a values assessment. The second one is a maturity assesment and the appropriate performance objective is included with it.

VALUES: WHAT IS IMPORTANT TO YOU

This is a self-survey consisting of nine questions about various situations in life. Its purpose is to help you think through the question, "What is important to me?"

It is not a test with right or wrong answers. Neither is it designed to tell you what you should think is important. It is not intended for research or counseling purposes. It is simply a means to help you to understand your own values.

DIRECTIONS

This survey consists of nine questions about what people consider to be important to them. For each question, read the four possible answers, and then rate the answers in the order of importance to you.

Give a rating of 4 to your highest choice.
Give a rating of 3 to your second highest choice.
Give a rating of 2 to your third highest choice.
Give a rating of 1 to your lowest choice.

Write your rating in the box to the right of each answer. Try to rate each item, but if you find it impossible to make a choice, give each item a rating of 2.5. DO NOT LEAVE ANY BLANKS.

Example: What kind of club or organization appeals to you the most?

a.	One that helps those in need in the community	If this is your lowest choice:	a.	1
b.	One that is well organized and gets things done	If this is your highest choice:	b.	4
c.	One with a good educational program	If this is your second highest choice:	c.	3
d.	One in which you can be a leader	If this is your third highest choice:	d.	2

QUESTIONS

1 Which of the following kinds of teachers appeals to you the most?

a One who gives you the most opportunities to work out your own ideas a ____

b One who gives you a chance to be in charge of a class project b ____

c One who makes a special effort to help those who have difficulty c ____

d One who makes it very clear what the assignments are and what is expected of you d ____

2 If you had a chance to take a trip, which of the following would be most important to you?

a Planning the trip carefully so that you will not have to worry about costs, lodging, transportation, and so on a ____

b Doing just what you want to do, when you want to do it, and not feeling tied to a fixed plan or schedule b ____

c Going to places where you will learn something new c ____

d Having others in the group look to you to take the lead in deciding where to go and what to do d ____

3 Which of the following would be most important to you in a job?

a The opportunity to work on your own initiative, without supervision a ____

b The opportunity to be of service to people b ____

c The opportunity to keep learning new things c ____

d The opportunity to do things well and have a feeling of accomplishment d ____

4 Which of the following would you consider the most important in relationships with the opposite sex?

a Being free to do whatever you want to do, whenever you want to a ____

b Having a steady boyfriend or girlfriend b ____

c Being the one who decides what the other should do c ____

d Dating different people in order to learn more about yourself and others d ____

5 Which of the following kinds of training programs appeals to you the most

a Training that will help you to get a job where people will be responsible to you a ____

b Training that will help to prepare you for a job with good prospects for security b ____

c Training for a job as a nurse, a social worker, or a counselor, or training for a similar job in which you could help other people with problems c ____

d Training for a job that will demand a great deal of effort, such as a research scientist, a first-class musician, a top-rated salesman, and so on d ____

6 Which of the following would you consider to be the most serious problem in a school

a Very few opportunities for students to assume leadership in running student organizations a ____

b Administrators or teachers not giving students a chance to express their views freely b ____

c More emphasis is placed on athletics than on academic studies c ____

d Little incentive to do one's best because standards of achievements are low d ____

7 Which of the following would you consider to be the most serious problem in a community?

a Few opportunities for employment or economic security for a family a ____

b A large number of people who seem self-centered and who do not care what happens to other people b ____

c The tendency of people to drift along in life without any clear-cut ideas of what they want to accomplish c ____

d The lack of good educational opportunities d ____

8 Which of the following kinds of people do you admire the most?

a One who has studied deeply or widely--a scholar a ____

b One who is concerned about the welfare of others and takes action to help them b ____

c One who has achieved success in pursuing his or her goals c ____

d One who is a "free spirit"--who goes his or her own way and lets you do the same d ____

9 Which of the following would give you the greatest feeling of satisfaction?

a Completing a long or a difficult job a ____

b Having enough money to feel secure about the future b ____

c Being a person of influence c ____

d Doing something for others d ____

SCORING

The items that you have rated were intended to be statements reflecting six different values. To find your "score" for each value, you should copy your ratings into the boxes under each of the values below.

Example: If you rated the items in questions 1 as follows:

1 Which of the following kinds of teachers appeals to ...

a One who gives you the most opportunities to work ... a ____

b One who gives you a chance to be ... b ____

c One who makes a special effort to help ... c ____

d One who makes it very clear what the assignments ... d ____

Write "4" in the box next to 1a under "Independence."
Write "3" in the box next to 1b under "Authority."
Write "2" in the box next to 1c under "Helpfulness."
Write "1' in the box next to 1d under "Security."

Note: The boxes below are not in the same order as in the survey. Work horizontally from the "Questions" to the "Scoring Boxes."

When you have copied your ratings, total each column to obtain your score for each value. Your scores may range from a low of 6 to a high of 24.

SCORING BOXES

Independence		Achievement		Authority		Helpfulness		Security		Learning	
1a	____	3d	____	1b	____	1c	____	1d	____	2c	____
2b	____	5d	____	2d	____	3b	____	2a	____	3c	____
3a	____	6d	____	4c	____	5c	____	4b	____	4d	____
4a	____	7c	____	5a	____	7b	____	5b	____	6c	____
6b	____	8c	____	6a	____	8b	____	7a	____	7d	____
8d	____	9a	____	9c	____	9d	____	9b	____	8a	____
	____ Total		____ Total		____ Total		____ Total		____ Total		____ Total

This values survey is adapted from the values survey developed by Dr. Margaret Jacobson Bubolz and was published in "Values-II, What's Important to you?" Extension Bulletin E-648, Cooperative Extension Service, Michigan State University.

COMPETENCY AREA: HUMAN RELATIONS

TASK: Display self-understanding

PERFORMANCE OBJECTIVE:

Given a maturity recognition assessment, the student will display self-understanding by completing the assessment in an acceptable manner.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

HOW TO RECOGNIZE THE EMOTIONALLY MATURE CHARACTERISTICS IN YOURSELF*

Directions: Place a check in the column that applies to you.

The emotionally mature person has been described as having the following characteristics

		Often Applies To Me	Seldom Applies To Me
1. Tolerates frustrations	1.	________	________
2. Is not emotional very often	2.	________	________
3. Does not go to extremes when they are emotional	3.	________	________
4. Can wait for what they want	4.	________	________
5. Is centered on a group rather than self	5.	________	________
6. Is tolerant	6.	________	________
7. Accepts responsibilities, even seeks them	7.	________	________
8. Thinks for self	8.	________	________
9. Is calm and exerts extra effort to keep on an even keel	9.		
10. Is motivated by a long-range plan, not by whims or the desires of each passing week	10.	________	________
11. Does not show off to bolster their self-confidence	11.	________	________
12. Can say "No" to self and makes it stick	12.	________	________
13. Does not nurse grudges or try to get even	13.	________	________
14. Tackles unpleasant tasks without self-pity	14.	________	________
15. Can take orders without being obstinate	15.	________	________
16. Can make up their mind decisively without dillydallying.	16.	________	________
17. Has close friends of both sexes	17.	________	________
18. Admits their shortcomings, but recognizes their strengths without being vain over them	18.	________	________
19. Can take criticism and profit from it	19.	________	________

*Donald L. Laird and Eleanor C. Laird, Practical Business Psychology, McGraw-Hill Book Company, New York, 1951.

COMPETENCY AREA: HUMAN RELATIONS

TASK: Demonstrate personality traits for job performance

PERFORMANCE OBJECTIVE:

Given an observation period of four weeks or more in an "office simulation classroom" or in a traditional classroom with adequate student interaction, the student will demonstrate personality traits for job performance. A checklist will be used to evaluate student performance. At least 4 of 5 must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

PERSONALITY TRAITS FOR JOB PERFORMANCE

Acceptable	Unacceptable	Personality Trait	Examples
		Dependable	reliable; willing to do routine things without being told; completes assignments on time; on hand when needed; punctual; does what they say they will do
		Self-Motivated	demonstrates initiative in thinking and acting without being urged; works beyond that which is required; ambitious
		Sincerely Interested	interested in ideas, suggestions, goals and other people; interest which leads to further growth and learning
		Follows Rules and Directions	shows a willingness to follow written and unwritten rules and directions; shows willingness to ask appropriate questions when uncertain of what is expected
		Realizes Limitations	sets realistic goals; has reasonable expectations of others; shows understanding of limited resources (time, money, human resource, space)

COMPETENCY AREA: HUMAN RELATIONS

TASK: Demonstrate personal traits for good human relations with employees and employer

PERFORMANCE OBJECTIVE:

Given an observation period of four weeks or more in an "office simulation classroom" or in a traditional classroom with adequate student interaction, the student will demonstrate good human relations with employees and employer. A checklist will be used to evaluate student performance. At least 3 or 4 must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

PERSONAL TRAITS FOR GOOD HUMAN RELATIONS

Acceptable	Unacceptable	Personal Trait	Example
		Cooperation	works harmoniously in groups; does their share of work; willingness to help others; shows flexibility through compromise
		Positive Attitude	shows enthusiasm in associations with others; looks for something good in others and is willing to praise them; adapts well to new people and situations; shows a good sense of humor
		Tactfulness	shows the ability to do and say the right thing when dealing with others; tries never to give offense to others; can give constructive criticism in a positive manner
		Recognizes Individual Differences	demonstrates patience; shows acceptance of differing attitudes, abilities, backgrounds, problems and moods

COMPETENCY AREA: HUMAN RELATIONS

TASK: Demonstrate appropriate personal conduct on the job

PERFORMANCE OBJECTIVE:

Given an observation period of four weeks or more in an "office simulation classroom" or in a traditional classroom with adequate student interaction, the student will demonstrate appropriate personal conduct on the job. A checklist will be used to evaluate student performance. At least 3 of 4 must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

PERSONAL CONDUCT ON THE JOB

Acceptable	Unacceptable	Personal Conduct Trait	Examples
		Courteous	well mannered; shows proper edict and poise; shows proper respect
		Honest	does not tell falsehoods; does not steal money, time, supplies or ideas
		Loyal	shows faithfulness to other members of the group; shows faithfulness to group causes, ideals and policies
		Self-control	tries to handle frustrations in a positive manner; avoids showing feelings of anger, jealousy, hate and worry; maintains appropriate tone of voice in stressful situations

COMPETENCY AREA: HUMAN RELATIONS

TASK: Analyze and develop solutions to personal behavior problems on a job

PERFORMANCE OBJECTIVE:

Given 5 personal behavior problems, the student will analyze and develop solutions to the personal behavior problems. Four out of the 5 problems must have acceptable solutions.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

ANALYZE AND SOLVE PERSONAL BEHAVIOR PROBLEMS*

Directions: For each of the following five personal behavior problems on human relations, give acceptable solutions. In solving the behavior problems, the following questions should be asked:

1. What is the real problem?
2. What are the important facts to consider in this problem?
3. What solutions to this problem can you think of? Describe a few.
4. What would happen if the solutions you suggested were followed? Explain the results of each solution you described.
5. Of the solutions you described, which would you recommend? Why?

SITUATION NUMBER 1

Brian was a very talented young artist. Although he had not been out of school long, he had already won many awards and prizes in graphic design, drawing, and painting. All through school he had won praise for his designs and illustrations for school publications and posters and for the pictures that he displayed.

Now Brian was working for a well-known advertising agency. He had been hired because of his unusual talent, even though he was younger than most of the agency's employees and had less experience. Brian was pleased and proud to have landed a job with such prestige. In fact, he was somewhat conceited about it.

Brian did not consider it necessary to try to get along with his co-workers at the agency. After all, with his talent, who needed other people? He was not rude, but he often failed to greet people he met. He made no effort to learn anyone's name. He expected special attention and recognition for his work and was upset if he did not receive it. Furthermore, he had personal habits that annoyed his co-workers. For instance, he made a great show of combing his hair in public. He would comb it over and over while he sat thinking at his drawing table, scattering loose hairs around as he did so.

Finally Ellen, who sat at the table next to Brian's, complained to the supervisor about Brian. Then the supervisor called Brian in for a talk and informed him that several employees had complained about him.

"You do good work, Brian," said the supervisor, "but Michelangelo you're not--at least not yet. I think you should know something about the accomplishments of the other artists who work here."

The supervisor showed Brian some newspaper clippings about prizes, awards, and praise from critics for the work of Ellen and others in the ad agency. Brian felt rather small. The supervisor finished by saying, "We'll let this incident pass this time, Brian, and chalk it up to inexperience. But don't let it happen again."

SITUATION NUMBER 2

Nan worked as a lab assistant at a large chemical firm. She was very conscious of her appearance. She wore the very latest styles all the time. She spent hours getting her hair just right and putting on makeup. Whenever she saw some new cosmetic advertised on television, she would hurry to buy it and try it out.

As a result, Nan was always broke. All her money was spent on clothes and cosmetics to make her more attractive. Also, she was always too busy making herself up and dressing to do anything else. She was almost always late for social engagements. She also was often late for work. Twice Nan passed up promotions, once because she would have had to wear a face mask and cap and didn't want to mess up her makeup and hair. On rainy days, Nan sometimes called in sick to avoid getting her hair wet and having it look messy and straggly at work.

Nan always wore the best clothes she could buy. Although she wore a smock at work to protect her street clothes, she twice spilled chemicals that ruined expensive pants. Her supervisor suggested that she wear less-expensive clothes to work. But Nan felt she had to look her "best" all the time. She was sure everyone would notice even the smallest thing wrong with an outfit she wore.

SITUATION NUMBER 3

Winifred prided herself on treating everyone the same and behaving the same way no matter where she was or with whom she was.

When she began working on her first job as an assistant policywriter for a large insurance company, Winifred kept her breezy manner in the office. She called everyone by his or her first name, or by a nickname if she thought of a cute one. Her pet name for Salvatore, an older employee, was Senile Sal. She did not mean any harm by it. She just thought it was funny.

Winifred like to use coarse language that shocked people. Her friends had always thought this was funny and "with it." She assumed that people in the office would think so too.

Before Winifred's probationary period was up, Mildred Foster, the manager, warned her about her behavior and language in the office. Ms. Foster also warned Winifred about not showing respect for others.

"I really don't know what you're talking about, Millie," Winifred said. "I treat everyone the same as I treat my best friends. What's wrong with that? And I don't talk any differently here than I do elsewhere."

SITUATION NUMBER 4

Wanda was very happy when she began working as a camera operator on the news program for a local television station. She had planned and studied to be a television camera operator for as long as she could remember.

Wanda was full of enthusiasm for her job. She had taken courses in school to learn how to operate the television cameras, and she knew she had a natural talent for the work. She was eager to learn more on the job and to develop her talent. Her own happiness made her overlook the fact that some of the other camera operators at the station seemed less than happy and enthusiastic.

Soon, though, Wanda began to realize that something was wrong and that her job was not going as well as she had believed it would be. Hal Petrarca, the station manager, turned out to be a difficult person to work with. For one thing, he never praised the operators' work. No matter what Wanda shot, he would say she should have done it differently.

Wanda covered a fire, and Hal criticized her for not showing more of the crowd watching it. The next time she covered a fire, she made a point of showing the crowd. Hal said that she should have concentrated on the fire.

Later she began to realize that Peter, another camera operator, was getting all the best assignments.. She and the others covered routine stories. Peter covered the exciting ones and the big ones. Also, Peter was allowed to think up and shoot his own feature stories. No one else was.

When Wanda asked for special assignments, Hal said, "No, you're not ready."

Wanda tried to do some stories on her own. Hal never used them. He also continued to find fault with everything that she did. It wasn't long before Wanda's enthusiasm for her career began to weaken. She even began to think that she should look into another line of work.

SITUATION NUMBER 5

"I don't think I can do that," Ann said. "I never really worked on projects that large."

"Of course you can, Ann," her supervisor, Ms. Black, said. "It's just like that work you have been doing."

"Gee, I don't know. I'd rather not take the chance. I'm sure I'll get it wrong," Ann insisted.

"Well, OK. I'll get someone else to do it," Ms. Black said.

Ann worked as a layout designer for a publishing company. Her job was to design attractive booklets and brochures. She did the work well, but she was unsure of herself. Several times Ms. Black asked Ann to try larger, harder projects. Each time Ann said she didn't think she could do them.

Once Ms. Black was going on vaction and asked Ann to be acting supervisor.

"Oh, I couldn't do that," Ann said. "I've never supervised other people before."

"Nonsense," Ms. Black said. "I'm sure you can do it. And it's only for one week. It will be good training for you."

"Oh no, I'd be terrible!" Ann said. "I'd really rather not."

Ms. Black asked another person to be the acting supervisor. Soon she stopped trying to get Ann to work on the larger, more important projects. Later, when Ms. Black and the general manager were discussing people to promote to assistant supervisor, Ann's name came up.

"Well, I used to think that Ann showed a lot of promise," Ms. Black said. "But I've changed my mind. I don't think she could do it. She's not a very positive person."

Cases were taken from McGraw-Hill publication of "Working at Human Relations" by Rosemary T. Fruehling with Edwin L. Herr as Consulting Editor.

INFORMATION PROCESSING SKILLS

TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
* 1. Demonstrate knowledge of computer terminology.	Required	9	36	4	14	11	46	5	83	9	60
	Desired	8	32	17	61	7	29	1	17	3	20
	Unnecessary	8	32	7	25	6	25	0	0	3	20
* 2. Enter data using the ten-key touch method.	Required	9	36	7	25	14	58	6	100	7	47
	Desired	9	36	9	32	4	17	0	0	4	27
	Unnecessary	7	28	12	3	27	25	0	0	3	20
* 3. Demonstrate correct keyboard technique.	Required	12	48	8	29	15	63	5	83	8	53
	Desired	6	24	13	46	4	17	1	17	4	27
	Unnecessary	7	28	7	20	6	25	0	0	3	20
* 4. Revise and correct entered information.	Required	12	48	12	43	13	54	6	100	11	73
	Desired	9	36	9	32	5	21	0	0	2	13
	Unnecessary	4	16	7	25	6	25	0	0	2	13
* 5. Output data to a printer and retrieve document.	Required	10	40	10	36	10	42	6	100	10	67
	Desired	9	36	9	32	6	25	0	0	2	13
	Unnecessary	6	24	9	32	8	33	0	0	3	20
* 6. Demonstrate beginning and exit procedures using a computer terminal.	Required	11	46	10	36	12	50	5	83	8	57
	Desired	8	33	11	39	6	25	1	17	2	14
	Unnecessary	5	21	7	25	6	25	0	0	4	29
* 7. Project the result of running a computer program.	Required	5	20	3	11	4	17	5	83	6	40
	Desired	8	32	10	36	6	25	1	17	4	27
	Unnecessary	12	48	15	53	14	58	0	0	5	33
* 8. Evaluate software packages for business applications such as accounting sub-systems or word processing.	Required	3	12	1	4	2	8	2	33	1	7
	Desired	8	32	8	29	7	29	3	50	6	40
	Unnecessary	14	56	19	67	15	63	1	17	8	53

* Objective and test are written for this task.

COMPETENCY AREA: Information Processing

TASK: Demonstrate knowledge of computer terminology

PERFORMANCE OBJECTIVE:

Given 25 computer terms and definitions, the student will demonstrate knowledge of computer terminology by matching the terms with the definitions. 20 definitions out of 25 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See following pages.

COMPUTER TERMS AND DEFINITIONS

Please place letter in front of definition to match the proper term on the left.

___ FORMAT

___ DATA

___ WORD PROCESSING

___ OUTPUT

___ CATHODE RAY TUBE (CRT)

___ ALPHANUMERIC

___ INFORMATION PROCESSING

___ INFORMATION

___ SCROLL

___ CURSOR

___ BOOT

___ FIELD

a. Combining alphabetic and numeric symbols

b. The process of loading the operating syste of a computer into main memory to begin operation.

c. An electronic vacuum tube that can be used to display text and graphic images.

d. The component of a word or data processing system that performs the arithmetic, logical, and control functions of the system.

e. An integrated circuit or circuits used as an internal processor.

f. A flashing or stationary rectangle or thin line of light used to indicate where data is expected to be entered on a video display unit.

g. Basic facts that can be processed.

h. A storage device consisting of a flat circular plate made of plastic or aluminum, coated with a magnetic material.

i. A device consisting of a motor and read/write heads which enable data to be stored on the disk.

j. A subdivision of a record, itself a collection of related data elements.

k. A piece of work, or several pieces of work, collected together on a disk and given a name or number.

l. A layout, presentation, or arrangement of data, on a screen file, or paper.

___	INPUT	m.	A term for any printouts that appear on paper.
___	FILE	n.	The orderly and useful arrangement of facts or data so that they are accurate, timely, complete and concise.
___	SOFTWARE	o.	The data or instructions that are entered into the processor for processing.
___	PROGRAM	p.	A collection of integrated circuits in which data is stored in a computer.
___	CENTRAL PROCESSING UNIT (CPU)	q.	A combination of word and data processing; the process of handling information.
___	DISK DRIVE	r.	A list of programs or tasks that can be performed by a program, displayed on the video screen. The operator may select each operation by pressing the appropriate key.
___	CHIP	s.	The result of processing. Anything the processor puts out.
___	DATA PROCESSING	t.	A sequence of instructions used by a computer to process data.
___	HARD COPY	u.	To move the text vertically or horizontally so it can be viewed on a video display screen.
___	MENU	v.	Term applied to all programs that can be used on a computer.
___	TEXT EDITING	w.	A total system of personnel, procedures, and equipment designed to handle business communications efficiently and economically.
___	DISK	x.	A series of steps followed in accepting and processing data to deliver information.
___	MEMORY	y.	Revising or updating text.

COMPUTER TERMS AND DEFINITIONS

1.	ALPHANUMERIC	Combining alphabetic and numeric symbols
2.	BOOT	The process of loading the operating system of a computer into main memory to begin operation.
3.	CATHODE RAY TUBE (CRT)	An electronic vacuum tube that can be used to display text and graphic images.
4.	CENTRAL PROCESSING UNIT (CPU)	The component of a word or data processing system that performs the arithmetic, logical, and control functions of the system.
5.	CHIP	An integrated circuit or circuits used as an internal processor.
6.	CURSOR	A flashing or stationary rectangle or thin line of light used to indicate where data is expected to be entered on a video display unit.
7.	DATA	Basic facts that can be processed.
8.	DATA PROCESSING	A series of steps followed in accepting and processing data to deliver information.
9.	DISK	A storage device consisting of a flat circular plate made of plastic or aluminum, coated with a magnetic material.
10.	DISK DRIVE	A device consisting of a motor and read/write heads which enable data to be stored on the disk.
11.	FIELD	A subdivision of a record, itself a collection of related data elements.
12.	FILE	A piece of work, or several pieces of work, collected together on a disk and given a name or number.
13.	FORMAT	A layout, presentation, or arrangement of data, on a screen, file, or paper.
14.	HARD COPY	A term for any printouts that appear on paper.
15.	HARDWARE	All the components of a computer that can be seen and touched.

16.	INFORMATION	The orderly and useful arrangement of facts or data so that they are accurate, timely, complete, and concise.
17.	INFORMATION PROCESSING	A combination of word and data processing; the process of handling information.
18.	INPUT	The data or instructions that are entered into the processor for processing.
19.	MAGNETIC TAPE (MAG TAPE)	A magnetic tape on which data can be stored.
20.	MEDIUM	Material, usually describing the one on which data is stored. Video tape, floppy disk, etc.
21.	MEMORY	A collection of integrated circuits in which data is stored in a computer.
22.	MENU	A list of programs or tasks that can be performed by a program, displayed on the video screen. The operator may select each operation by pressing the appropriate key.
23.	OUTPUT	The result of processing. Anything the processor puts out.
24.	PROGRAM	A sequence of instructions used by a computer to process data.
25.	SCROLL	To move the text vertically or horizontally so it can be viewed on a video display screen.
26.	SOFTWARE	Term applied to all programs that can be used on a computer.
27.	TEXT EDITING	Revising or updating text.
28.	WORD PROCESSING	A total system of personnel, procedures, and equipment designed to handle business communications efficiently and economically.

COMPUTER TERMS AND DEFINITIONS

Please place letter in front of definition to match the proper term on the left.

l	FORMAT	a.	Combining alphabetic and numeric symbols
g	DATA	b.	The process of loading the operating system of a computer into main memory to begin operation.
w	WORD PROCESSING	c.	An electronic vacuum tube that can be used to display text and graphic images.
s	OUTPUT	d.	The component of a word or data processing system that performs the arithmetic, logical, and control functions of the system.
c	CATHODE RAY TUBE (CRT)	e.	An integrated circuit or circuits used as an internal processor.
a	ALPHANUMERIC	f.	A flashing or stationary rectangle or thin line of light used to indicate where data is expected to be entered on a video display unit.
q	INFORMATION PROCESSING	g.	Basic facts that can be processed.
n	INFORMATION	h.	A storage device consisting of a flat circular plate made of plastic or aluminum, coated with a magnetic material.
u	SCROLL	i.	A device consisting of a motor and read/write heads which enable data to be stored on the disk.
f	CURSOR	j.	A subdivision of a record, itself a collection of related data elements.
b	BOOT	k.	A piece of work, or several pieces of work, collected together on a disk and given a name or number.
j	FIELD	l.	A layout, presentation, or arrangement of data, on a screen file, or paper.

o INPUT

h FILE

v SOFTWARE

t PROGRAM

d CENTRAL PROCESSING UNIT (CPU)

i DISK DRIVE

e CHIP

x DATA PROCESSING

m HARD COPY

r MENU

y TEXT EDITING

h DISK

p MEMORY

m. A term for any printouts that appear on paper.

n. The orderly and useful arrangement of facts or data so that they are accurate, timely, complete and concise.

o. The data or instructions that are entered into the processor for processing.

p. A collection of integrated circuits in which data is stored in a computer.

q. A combination of word and data processing; the process of handling information.

r. A list of programs or tasks that can be performed by a program, displayed on the video screen. The operator may select each operation by pressing the appropriate key.

s. The result of processing. Anything the processor puts out.

t. A sequence of instructions used by a computer to process data.

u. To move the text vertically or horizontally so it can be viewed on a video display screen.

v. Term applied to all programs that can be used on a computer.

w. A total system of personnel, procedures, and equipment designed to handle business communications efficiently and economically.

x. A series of steps followed in accepting and processing data to deliver information.

y. Revising or updating text.

COMPETENCY AREA: Information Processing

TASK: Enter data using ten-key touch method

PERFORMANCE OBJECTIVE:

Given a multi-item exercise containing digits 0 through 9 and the decimal, the student will demonstrate the touch method of operation while solving problems using a ten-key calculator. A checklist will be used to evaluate performance. All items on the checklist must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See following pages.

TEN-KEY TOUCH METHOD

Work each problem as rapidly as possible and record your answer below the problem.
Prove each answer and record it in the Answers column.
Complete the test as rapidly as you can.

1	2	3	4	5
665.32	300.88	.70	98.24	.57
8.79	407.25	364.49	3.13	4.64
6.48	353.37	31.29	.52	648.57
8.04	134.78	.62	.20	9,897.41
65.88	35.96	.10	92.43	.90
8,372.83	889.68	828.65	647.28	30.71
71.54	603.55	963.84	963.01	.62
43.56	7.96	89.42	7,356.53	28.68
70.09	814.42	51.19	1,052.15	8.02
711.17	5,651.92	70.70	881.69	304.18
______	______	______	______	______

6	7	8	9	10
641.62	.44	12.18	1.27	308.91
93.61	.44	30.96	1.27	56.21
89.92	.44		1.27	3,046.23
69.47	73.81	S______	1.27	26.11
7.53	17.45	4.17	1.27	93.54
		7.61	1.27	4.19
S______	S______	6.48		
2,824.52	521.84	6.48	S______	S______
215.26	591.22	.38	569.43	964.85
371.38	468.21	2.77	82.65	479.19
1.47	444.68	.65	171.18	72.13
25.96	389.71	1.24	1.77	226.86
T______	T______	T______	T______	T______

11	12	13	14	15
724.03	2,528.16	812.46	36.28	374.24
− 83.57	−2,102.76	−253.99	−509.22	−502.46
______	______	______	______	______

16	17	18	19	20
5.88	526.85	519.84-	23.59	5.36-
627.54-	815.69	2.30	824.13	702.51
429.51-	437.09	87.94-	367.58	434.57-
11.53	85.96	60.52-	367.58	223.69-
956.87	231.47-	60.52	367.58-	8.54
33.46	231.47	60.52	61.77	648.57
212.58-	108.62	443.51	569.41	915.23
7.05	68.69	36.74	22.32-	88.88
835.96	824.53	926.58	5.25-	7.56
7.05	3,349.52	298.71-	18.64-	3,098.36
514.71	432.48-	726.43	46.69-	43.84-
92.36	8.05-	21.65	1.04	44.48-
109.65-	767.63	85.68	736.88	5.56
23.65	9.99	226.34-	9.69	42.37
14.58	18.54-	674.88	665.54	95.76

21	22	23	24	25
94.562	6,274.214	706.648	913.424	178.557
977.289	236.148	64.630	20.966	9.284
257.824	3,765.229	497.095	46.994	6,023.125
5,257.713	986.213	64.675	5,942.882	227.285
254.398	243.467	4.158	840.841	438.864
41.665	9,673.185	5,750.129	41.819	89.427
41.667	11.556	329.574	105.543	701.645
7.368	109.164	143.149	6.947	857.405
1,907.528	110.633	50.762	67.387	6,614.551
280.046	1.958	240.258	754.209	29.297

TEN-KEY TOUCH METHOD

ANSWER KEY

1	2	3	4	5
665.32	300.88	.70	98.24	.57
8.79	407.25	364.49	3.13	4.64
6.48	353.37	31.29	.52	648.57
8.04	134.78	.62	.20	9,897.41
65.88	35.96	.10	92.43	.90
8,372.83	889.68	828.65	647.28	30.71
71.54	603.55	963.84	963.01	.62
43.56	7.96	89.42	7,356.53	28.68
70.09	814.42	51.19	1,052.15	8.02
711.17	5,651.92	70.70	881.69	304.18
______	______	______	______	______

6	7	8	9	10
641.62	.44	12.18	1.27	308.91
93.61	.44	30.96	1.27	56.21
89.92	.44		1.27	3,046.23
69.47	73.81	S______	1.27	26.11
7.53	17.45	4.17	1.27	93.54
		7.61	1.27	4.19
S______	S______	6.48		
2,824.52	521.84	6.48	S______	S______
215.26	591.22	.38	569.43	964.85
371.38	468.21	2.77	82.65	479.19
1.47	444.68	.65	171.18	72.13
25.96	389.71	1.24	1.77	226.86
T______	T______	T______	T______	T______

Answers

1		10.023.70
2		9.199.77
3		2.401.00
4		11.095.18
5		10.924.30
6	S	902.15
	T	4.340.74
7	S	92.58
	T	2.508.24
8	S	43.14
	T	72.92
9	S	7.62
	T	832.65
10	S	3.535.19
	T	5.278.22

11	12	13	14	15
724.03	2,528.16	812.46	36.28	374.24
− 83.57	−2,102.76	−253.99	−509.22	−502.46

16	17	18	19	20
5.88	526.85	519.84−	23.59	5.36−
627.54−	815.69	2.30	824.13	702.51
429.51−	437.09	87.94−	367.58	434.57−
11.53	85.96	60.52−	367.58	223.69−
956.87	231.47−	60.52	367.58−	8.54
33.46	231.47	60.52	61.77	648.57
212.58−	108.62	443.51	569.41	915.23
7.05	68.69	36.74	22.32−	88.88
835.96	824.53	926.58	5.25−	7.56
7.05	3,349.52	298.71−	18.64−	3,098.36
514.71	432.48−	726.43	46.69−	43.84−
92.36	8.05−	21.65	1.04	44.48−
109.65−	767.63	85.68	736.88	5.56
23.65	9.99	226.34−	9.69	42.37
14.58	18.54−	674.88	665 54	95.76

Set the Decimal Selector at 3 to work problems 21-25.

21	22	23	24	25
94.562	6,274.214	706.648	913.424	178.557
977.289	236.148	64.630	20.966	9.284
257.824	3,765.229	497.095	46.994	6,023.125
5,257.713	986.213	64.675	5,942.882	227.285
254.398	243.467	4.158	840.841	438.864
41.665	9,673.185	5,750.129	41.819	89.427
41.667	11.556	329.574	105.543	701.645
7.368	109.164	143.149	6.947	857.405
1,907.528	110.633	50.762	67.387	6,614.551
280.046	1.958	240.258	754.209	29.297

Answers

11	640.46
12	425.40
13	558.47
14	−472.94
15	−128.22
16	1,123.82
17	6.535.50
18	1.845.46
19	3.166.73
20	4.861.40
21	9.120.050
22	21.411.767
23	7.851.078
24	8.741.012
25	15.169.440

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TEN-KEY TOUCH METHOD CHECK LIST

	Acceptable	Unacceptable
1. Fingers begin from home position	________	________
2. Fingers return to home keys when inactive	________	________
3. Proper fingering used on all keys	________	________
4. Eyes remain on copy during keyboarding	________	________
5. A position maintainer is used whenever possible	________	________
6. Correct fingering	________	________
7. Eyes on copy	________	________

COMPETENCY AREA: Information Processing

TASK: Demonstrate correct keyboard techniques.

PERFORMANCE OBJECTIVE:

Given straight copy material, the student will demonstrate correct keyboard techniques. A checklist will be used for evaluation. All items must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See following pages.

KEYBOARDING TECHNIQUES CHECKLIST

	Acceptable	Unacceptable
Hand Position: Fingers curved Wrists low and off machine Forearm par to keyboard		
Eye Direction: Eye on copy		
Posture: Sits up straight Feet apart and flat on floor		
Work Habits: Follows directions Alert and not tense Makes effort to reach goals Proper fingering		

KEYBOARDING TECHNIQUES CHECKLIST

	Acceptable	Unacceptable
Hand Position	________	________
Eye Direction	________	________
Posture	________	________
Work Habits	________	________

COMPETENCY AREA: Information Processing

TASK: Revise and correct entered information

PERFORMANCE OBJECTIVE:

Given entered data, the student will revise and correct entered information. A checklist will be used to evaluate. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST:

Directions for the instructor:

1. Have the student enter data from pages 18, 19, and 20 and store on disk or tape.
2. Have the student retrieve data; edit as on pages 21, 22, and 23; and make a hard copy.
3. The key for the instructor is on pages 24, 25, and 26.

LEISURE LIVING LOOKS TO THE FUTURE

Leisure Living was started by George and Margaret Hopkins as a family hobby shop just thirty years ago. The Hopkins rented a small store on the outskirts of Des Moines and planned to spend the rest of their working lives selling airplane models and model railraod supplies to their friends and neighbors.

However, the penchant for quality that George and Margaret shared soon resulted in their reputation spreading throughout the Des Moines area for quality products and very helpful service. Some one suggested that they should expand their product lines to incorporate other craft and hobby areas. When their oldest son, Chester, decided to join the family business, he took the first steps to fill such requests. In just a shortperiod of time Leisure Living, Inc. was born with a full line of craft/hobby supplies.

LLI has grown from retail sales of $5,000 annually to over $1,000,000. Its reputation has spread throughout the United States, Mexico, and Canada. Its catalog sales alone account for nearly $500,000 per year. It employed over two hundred persons at the Des Moines headquarters. The question is, What is the future for Leisure Living?

First, the best information available indicates that the market for craft supplies is a growing one:

"With people retiring earlier and living better, the future of the craft industry can only be described as rosy. Market analysts predict that an increase of 20 percent in gross sales over the next decade is conservative."[1]

Second, a thorough analysis of product lines must be an ongoing one. An analysis at this time would suggest that the following products should probably be eliminated from our store and catalog offerings:

1. Macrame supplies--these are available very inexpensively from discount department stores. Thus the call for our quality of products is greatly diminised.

2. Model railroad supplies--although we have a sentinmental attachment to these because they represent our beginning, there really is very little call for them. They represent less then 3 percent of our total sales.

3. Flower construction kits--Ready-made flowers of good quality are available at very reasonable prices. The time involved in this craft is of such that the market has dropped dramatically in recent years.

Third, our analysis would lead us to believe that we should consider adding the following:

1. An international crafts area. This might include
   a. Danish needlework,
   b. Norwegian rosemauling,
   c. Oriental brush techniques with H_2O,
   d. African woodcarving,
   e. Spanish basketry,

Seminars would be a necessary part of adding these to our product lines. However, our experience has been that the word spreads quickly about new crafts. Sales tend to be very brisk the first few months; if the craft was professionally introduced, a steady market then holds for many months.

2. Unfinished furniture. This could be limited to smaller items. Again, this has been very profitable for those stores that have offered quality products.

3. "Programming for fun" materials. This is an untapped market. While the necessary instructional materials are presently offered only in computer

stores, this is truly a hobby for many persons and has great potential for a firm such as Leisure Living.

The important factors in the future of Leisure Living are really obvious but bear repeating. We must constantly try to stay ahead of the market. We have been quite successful in this area thorough our active participation in guilds. The other factor is to know when to drop a particular hobby or craft. Our clerks are trained to try to interest customers inquiring about supplies for a craft we no longer carry in a new avocation.

We are excited about the future of Leisure Living and feel absolutely certain that we can maintain our leadership in the crafts.

Please correct rough draft as indicated.

July 1

DRAFT COPY

LEISURE LIVING LOOKS TO THE FUTURE

TS

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However, the ~~penchant~~ concern for quality that George and Margaret shared soon resulted in their reputation spreading throughout the Des Moines area for quality products and very helpful service. Some one soon suggested that they should expand their product lines to ~~incorporate~~ other craft and hobby areas. Only when their oldest son, Chester, decided to join the family business~~,~~ did he take ~~took~~ the first steps to fill such requests. In just a short period of time, Leisure Living, Inc., was born with a full line of craft/hobby supplies.

side head (Product Line Recommendations

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[1] "The Future for Crafts," *Happy Hobbies*, Vol. XI, No. 3, p. 31.

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SS

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WORD PROCESSING CHECKLIST

	Acceptable	Unacceptable
1. Hyphenation	______	______
2. Scrolling		
a. Vertical	______	______
b. Horizontal	______	______
3. Block Features		
a. Copy	______	______
b. Move		
Word	______	______
Line	______	______
Block	______	______
4. Line Spacing (Single and Double)	______	______
5. Insert Features		
a. Character	______	______
b. Word	______	______
c. Line	______	______
d. Block	______	______
6. Delete Features	______	______
a. Character	______	______
b. Word	______	______
c. Line	______	______
d. Block	______	______

WORD PROCESSING CHECKLIST
PAGE 2

	Acceptable	Unacceptable
7. Search and Replace Function		
Search only (Search for Living)	______	______
Global Search	______	______
Replace (Replace Living with Hobbies)	______	______
8. Capitalization	______	______
9. Screen Formatting		
a. Margins		
Right	______	______
Left	______	______
Top	______	______
Bottom	______	______
Page Length	______	______
b. Tabs	______	______
c. Underlining	______	______
d. Centering	______	______
e. Super/Subscripts	______	______
10. Save Document	______	______
11. Retrieve Document	______	______
12. Justification		
a. Right	______	______
b. Left	______	______
c. Center	______	______
13. Paragraph Indentation	______	______

WORD PROCESSING CHECKLIST
Page 3

	Acceptable	Unacceptable
14. Tab Settings		
a. Set	________	________
b. Clear	________	________
15. Headers		
a. Page Numbering	________	________
b. Title	________	________
16. Footers	________	________
17. Boldface (the title)	________	________

WORD PROCESSING KEY

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the first few months; while a slight decline may follow, a steady market then holds for many months.

2. UNFINISHED FURNITURE. This could be limited to smaller items. Again, this has been very profitable for those stores that have offered quality products.

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DATA PROCESSING CHECKLIST

Using available textbooks and diskettes, the student should be able to do the following tasks.

	Acceptable	Unacceptable
1. Retrieve	________	________
2. Insert	________	________
3. Delete	________	________
4. Save	________	________
5. Manipulate information according to a specific sort	________	________
6. Print requested information	________	________

GRAPHICS CHECKLIST

Using available textbooks and diskettes, the student should be able to create the following.

	Acceptable	Unacceptable
1. Bar Chart		
2. Line Chart		
3. Pie Chart		
4. Print Out Charts (if possible)		

COMPUTERIZED ACCOUNTING CHECKLIST

Using available textbooks and diskettes, the student should be able to do the following tasks.

	Acceptable	Unacceptable
1. General Ledger		
a. Journal Entries		
b. Financial Statements		
c. Closing Statements		
2. Accounts Payable Transactions		
a. Enter Data		
b. Print Out Checks		
c. Print Out Accounts Payable Schedule		
3. Accounts Receivable		
a. Enter Data		
b. Print Out Statements		
c. Print Out Accounts Receivable Schedule		
4. Payroll		
a. Enter Data		
b. Print Out Checks		
c. Print Out Reports		

ELECTRONIC SPREADSHEET CHECKLIST

Using a simple budget for the assignment, the student should be able to do the following tasks.

	Acceptable	Unacceptable
1. Write a Rough Draft of Business Form	________	________
2. Load Spreadsheet Program	________	________
3. From Rough Draft Design Template Using Replicate Commands	________	________
4. Enter Necessary Data Including Mathematical Formulas	________	________
5. Enter Lines to Separate Data Amounts From Column Totals	________	________
6. Save Template	________	________
7. Print Template	________	________
8. Clear Screen	________	________
9. Retrieve Above Template	________	________
10. Change an Expense Amount	________	________
11. Print Template with Change	________	________
12. Compare the Two Spreadsheets	________	________

COMPETENCY AREA: Information Processing

TASK: Output data to a printer and retrieve document

PERFORMANCE OBJECTIVE:

Given keyed-in data, the student will output data to a printer and retrieve the document. A checklist will be used to evaluate. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See following pages.

RETRIEVE AND PRINT CHECKLIST

	Acceptable	Unacceptable
1. Retrieve Keyed-In Data	________	________
2. Printer Preparation		
a. Cables Connected to Computer	________	________
b. On/Off Switch	________	________
c. Printer On Line	________	________
d. Proper Paper Inserted Properly	________	________
e. Check Ribbon for Proper Printing	________	________
f. Check Print Head or Font for Proper Setting		
3. Computer Codes to Activiate Printer	________	________
4. Placement of Printed Document on Paper	________	________
5. Paper Removal Procedure	________	________

COMPETENCY AREA: Information Processing

TASK: Demonstrate beginning and exit procedures using a computer terminal

PERFCRMANCE OBJECTIVE:

Given a computer terminal, the student will demonstrate beginning and exit procedures using a computer terminal in accordance with individual system's manual. A checklist will be used for evaluation. All items on the evaluation checklist must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See following pages.

BEGINNING AND EXIT PROCEDURES CHECKLIST

	Acceptable	Unacceptable
1. Cables Connected to Computer		
2. Computer Connected to Electrical Outlet		
3. Computer Equipment Turned On in Proper Sequence		
4. Log On (If required for system)		
5. Load and Run Software As Instructed By Instructor		
6. Exit Program		
7. Log Off (If required for system)		
8. Computer Equipment Turned Off in Proper Sequence		
9. Software Returned to Proper Storage		

COMPETENCY AREA: Information Processing

TASK: Project the result of running a computer program.

PERFORMANCE OBJECTIVE:

Given a hard copy of a computer program and a short answer test, the student will project the result of running the computer program with 100% accuracy.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages.

Directions for the instructor:

1. The input problem for this evaluation is on page 37. Students should read this problem.
2. Students should study the program on page 38 and answer the questions on page 39.
3. Page 41 contains the flowchart for this program. Teachers may use this if they teach flowcharting.
4. Page 40 contains the output to this BASIC program.
5. The teacher's key to the program quiz is on page 42.

Input

Input consists of weekly production records containing an employee number, employee name, and the number of units manufactured by the employee for the four weeks of the work month. A sample of the input is illustrated below.

	EMPLOYEE NUMBER	EMPLOYEE NAME	WEEK 1	WEEK 2	WEEK 3	WEEK 4
	108	T. JAMES	25	33	43	56
	110	B. BEARS	23	43	22	55
	198	E. MILES	44	56	76	44
	999	END FILE	99	99	99	99
Variable Names	N	N$	W1	W2	W3	W4

Figure A-11

To process the input data, the weekly production figures must be added together to obtain the total monthly production for each employee. The total production for each employee must then be added into an accumulator to obtain the total production for all employees. In addition, a count is to be obtained of the total number of employees.

```
100 REM PROG02      JAN 15             GBS
110 REM
120 REM THIS PROGRAM READS PRODUCTION
130 REM RECORDS AND PRODUCES A LISTING.
140 REM TOTAL MONTHLY  PRODUCTION IS
150 REM CALCULATED BY ADDING THE WEEKLY
160 REM PRODUCTION OF EACH EMPLOYEE.
170 REM AFTER ALL RECORDS ARE PROCESSED
180 REM THE NUMBER OF EMPLOYEES ARE
190 REM PRINTED AND THE TOTAL PRODUCTION
200 REM OF ALL EMPLOYEES IS DISPLAYED.
210 REM
220 REM VARIABLE NAMES:
230 REM   N.....EMPLOYEE NUMBER
240 REM   N$....EMPLOYEE NAME
250 REM   W1....WEEK 1 PRODUCTION
260 REM   W2....WEEK 2 PRODUCTION
270 REM   W3....WEEK 3 PRODUCTION
280 REM   W4....WEEK 4 PRODUCTION
290 REM   T.....TOTAL MONTHLY PRODUCTION
300 REM   F1....FINAL TOTAL - EMPLOYEES
310 REM   F2....FINAL TOTAL - PRODUCTION
320                                  REM
330 LET F1 = 0
340 LET F2 = 0
350 PRINT TAB(10) 'PRODUCTION LISTING'
360 PRINT
370 PRINT 'NUMBER', '  NAME', 'TOTAL'
380 PRINT
390                                  REM
400 READ N, N$, W1, W2, W3, W4
410   IF N = 999 THEN 800
420     LET F1 = F1 + 1
430     LET T = W1 + W2 + W3 + W4
440     LET F2 = F2 + T
450     PRINT N, N$, T
460 GOTO 400
470                                  REM
800 PRINT
810 PRINT 'TOTAL EMPLOYEES'; F1
820 PRINT 'TOTAL PRODUCTION'; F2
830                                  REM
900 REM ***** DATA TO BE PROCESSED *****
910 REM
920 DATA 108, T. JAMES, 25, 33, 43, 56
930 DATA 110, B. BEARS, 23, 43, 22, 55
940 DATA 198, E. MILES, 44, 56, 76, 44
950 DATA 999, END FILE, 99, 99, 99, 99
990 END
```

COMPUTER PROGRAM SHORT ANSWER TEST

1. What is the purpose of the REM statement?

2. What is the purpose of lines 330 and 340?

3. What is the purpose of line 360?

4. How many columns will be in the output?

5. What is the purpose of line 950?

6. What will be the final value of F1 after all records are read?

7. What will be the final value of F2 after all records are read?

8. What is the value of T when the second record is read?

9. What is the purpose of line 990?

10. What is the purpose of line 460?

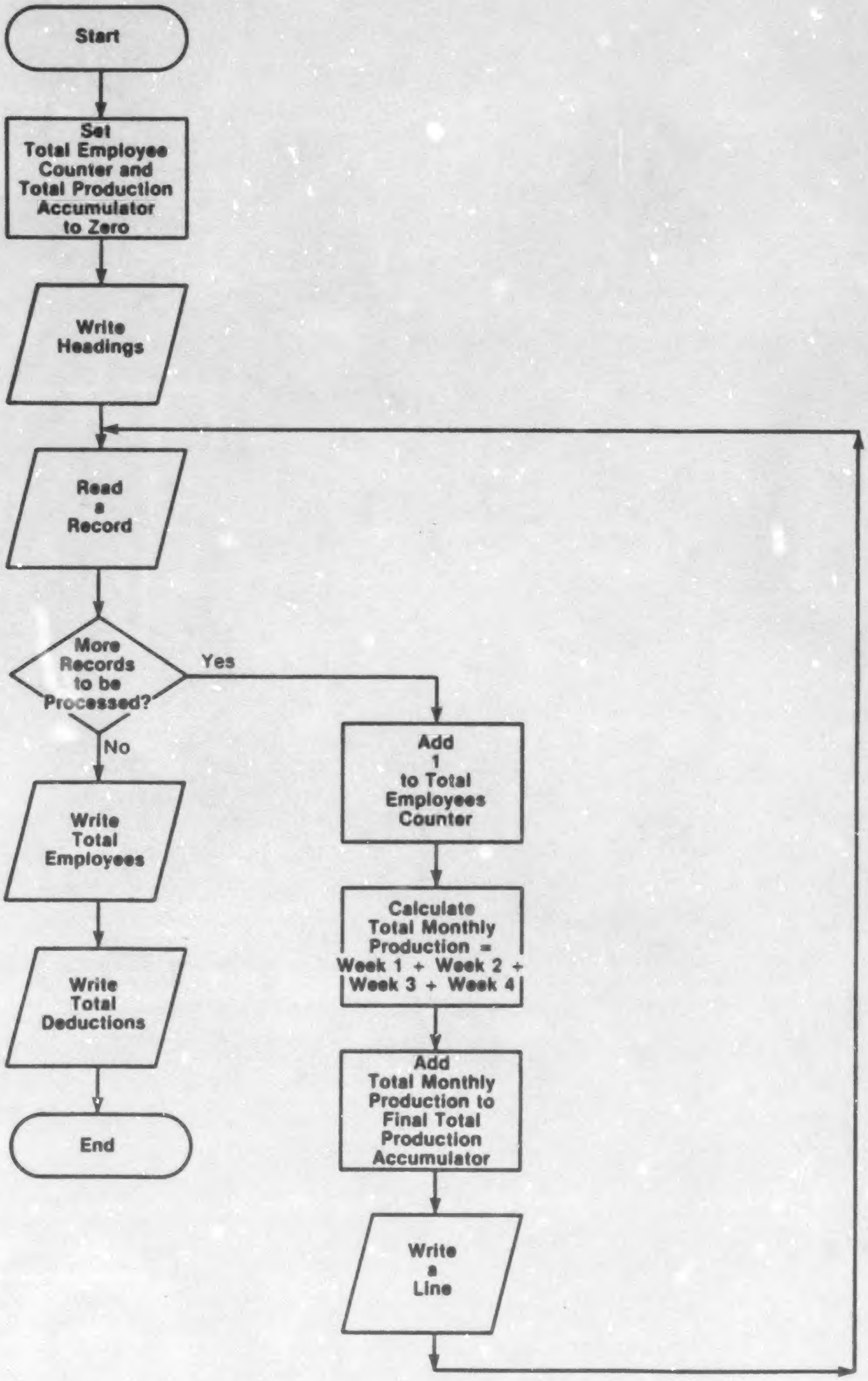
COMPUTER PROGRAM OUTPUT KEY

```
            PRODUCTION LISTING

NUMBER              NAME          TOTAL

 108             T. JAMES          157
 110             B. BEARS          143
 198             E. MILES          220

TOTAL EMPLOYEES 3
TOTAL PRODUCTION 520
```

NOTE:
In the output report, the numeric fields are indented one space. This space is automatic and allows for the minus sign if present.

TRANSPARENCY MASTER.
INTRODUCTION TO COMPUTERS
AND DATA PROCESSING.
SHELLY/CASHMAN.
1980 ANAHEIM PUBLISHING CO.,FULLERTON,CA. 92631

COMPUTER PROGRAM FLOW CHART


Start
Set Total Employee Counter and Total Production Accumulator to Zero
Write Headings
Read a Record
More Records to be Processed?
Yes
No
Add 1 to Total Employees Counter
Calculate Total Monthly Production = Week 1 + Week 2 + Week 3 + Week 4
Add Total Monthly Production to Final Total Production Accumulator
Write a Line
Write Total Employees
Write Total Deductions
End

TRANSPARENCY MASTER
INTRODUCTION TO COMPUTERS
AND DATA PROCESSING.
SHELLY/CASHMAN.

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COMPUTER PROGRAM SHORT ANSWER TEST

ANSWER KEY

1. What is the purpose of the REM statement? DOCUMENTATION

2. What is the purpose of lines 300 and 340? INITIALIZATION

3. What is the purpose of line 360? TO PRINT A BLANK LINE

4. How many columns will be in the output? 3

5. What is the purpose of line 950? FLAG OR TRIP RECORD

6. What will be the final value of F1 after all records are read? 3

7. What will be the final value of F2 after all records are read? 520

8. What is the value of T when the second record is read? 143

9. What is the purpose of line 990? TO INDICATE FINAL EXECUTION OF PROGRAM

10. What is the purpose of line 460? TO PROCESS NEXT RECORD

MAILING SKILLS

	TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
			#	%	#	%	#	%	#	%	#	%
*	1. Make decisions on best mail service.	Required	17	68	10	36	6	25	1	17	7	47
		Desired	5	20	12	43	10	42	1	17	4	27
		Unnecessary	3	12	6	21	8	33	4	66	4	27
*	2. Process incoming mail.	Required	18	72	18	64	11	46	1	17	12	80
		Desired	5	20	8	29	6	25	2	33	2	13
		Unnecessary	2	8	2	7	7	29	3	50	1	7
*	3. Process outgoing mail and maintain a mailing list.	Required	16	64	20	71	11	46	2	33	11	73
		Desired	7	28	6	21	7	29	2	33	2	13
		Unnecessary	2	8	2	7	6	25	2	33	2	13
*	4. Forward mail.	Required	16	64	16	57	11	46	1	17	8	53
		Desired	5	20	8	29	4	17	1	17	2	13
		Unnecessary	4	16	4	14	9	38	4	68	5	33

* Objective and test are completed for this task.

COMPETENCY AREA: MAILING

TASK: Make decisions on best mail services

PERFORMANCE OBJECTIVE:

Given a two-part matching test with Part I consisting of 6 classes of mail and a 10-item test and with Part II consisting of 8 special services and a 8-item test, the student will make decisions on the best mail service by matching items with classes or special services. On Part I, 7 of 10 items must be correct and on Part II, 6 of 8 items must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

MAKING MAILING DECISION ON BEST MAIL SERVICES TO USE

Directions: In Part I match the class of mail with the items. In Part II match the special service with item description.

Part I

ITEM

______ 1. Newspapers, magazines, other periodicals

______ 2. All sealed written materials

______ 3. Circulars, catalogs, newsletters, booklets

______ 4. All mailable matter weighing from 1 to 70 lbs. and not included in first or second class

______ 5. A package specially marked to go first class that weighs from 1 to 70 lbs.

______ 6. Business reply cards

______ 7. Matter that is partly or totally handwritten, such as checks, filled-in forms, statements of account

______ 8. Printed matter, packages

______ 9. Books

______ 10. Catalog or course listing of a university that is issued at least 4 times a year.

CLASS

a. First-class

b. Second-class

c. Third-class

d. Fourth-class (Parcel Post)

e. Express mail

f. Priority

Part II

ITEM DESCRIPTION

______ 1. Provides record of delivery and receipt

______ 2. Amount of ordered goods collected on delivery

______ 3. First-class mail plus immediate delivery

______ 4. Provides insurance up to $10,000 plus a receipt for sender and proof of delivery

______ 5. Provides insurance for third- and fourth-class mail up to $200 against loss or damage

______ 6. A message sent by the combined services of the U. S. Postal Service and Western Union

______ 7. The fastest method of processing mail

______ 8. Packages that travel with first-class mail and are processed before regular third- and fourth-class mail, but after priority mail.

SPECIAL SERVICE

a. Special Delivery

b. Registered

c. Certified

d. Insured

e. COD

f. Express Mail

g. Special Handling

h. Mailgram

COMPETENCY AREA: MAILING

TASK: Process incoming mail

PERFORMANCE OBJECTIVE:

Given 10 pieces of incoming mail, including some mail marked personal or confidential, the student will process the mail as follows: open, date, sort, and distribute. A checklist will be used to rate performance. All items must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

INCOMING MAIL CHECKLIST

	Rating*	
	Acceptable	Unacceptabl
1. Did not open confidential mail		
2. Removed all contents from envelopes		
3. Did not damage contents		
4. Attached envelopes to correspondence, if necessary		
5. Attached enclosures to cover letter		
6. Noted any irregularities, such as enclosure not included		
7. Marked mail with date received		
8. Attached pertinent correspondence, if appropriate		
9. Sorted mail appropriately, prior to distribution		
10. Placed processed mail in appropriate place.		

*All activities must receive an acceptable rating.

COMPETENCY AREA: MAILING

TASK: Process outgoing mail

PERFORMANCE OBJECTIVE:

6

Given [illegible] pieces of outgoing mail, the student will process the mail as follows verify address, check for proper enclosure, fold, seal, and mark postage. A checklist will be used to rate performance. All items must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See following page

OUTGOING MAIL CHECKLIST

	Rating*	
	Acceptable	Unacceptable
1. Verified correctness of address on document		
2. Checked for proper enclosures		
3. Folded mail properly		
4. Sealed envelopes		
5. Marked or affixed correct amount of postage		
6. Deposited mail in appropriate place		

*All activities must receive an acceptable rating.

COMPETENCY AREA: MAILING

TASK: Forward mail

PERFORMANCE OBJECTIVE:

Given 5 pieces of mail to be forwarded, the student will process the mail as follows: re-address all first-class mail, prepare for forwarding, and attach postage. A checklist will be used to rate performance. All items must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

FORWARDING MAIL CHECKLIST

	Rating*	
	Acceptable	Unacceptable
1. Re-addressed all first-class mail		
2. Prepared other classes of mail for forwarding		
3. Attached postage where appropriate		
4. Properly disposed of mail not to be forwarded		

MATH AND CALCULATOR SKILLS

TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
• 1. Solve math problems consisting of whole numbers using a ten-key machine.	Required	16	64	17	61	22	96	2	33	14	93
	Desired	5	20	6	21	0	0	4	68	0	0
	Unnecessary	4	16	5	18	1	4	0	0	1	7
• 2. Solve math problems consisting of decimal numbers using a ten-key machine.	Required	15	60	16	57	22	96	2	33	13	87
	Desired	6	24	7	25	0	0	3	50	0	0
	Unnecessary	4	16	5	18	1	4	1	17	2	13
• 3. Solve math problems consisting of mixed numbers using a ten-key machine.	Required	12	48	18	64	20	87	2	33	11	73
	Desired	7	28	6	21	2	9	3	50	3	20
	Unnecessary	6	24	4	14	1	4	1	17	1	7
• 4. Round numbers to designated decimal places.	Required	14	56	14	50	21	91	1	17	11	73
	Desired	5	20	7	25	1	4	3	50	4	27
	Unnecessary	6	24	7	25	1	4	2	33	0	0
• 5. Compute cash discounts.	Required	8	32	13	46	16	70	2	33	10	67
	Desired	5	20	3	11	1	4	2	33	0	0
	Unnecessary	7	28	13	46	6	26	2	33	1	7
• 6. Convert proper fractions to decimals.	Required	9	36	8	29	10	44	1	17	8	53
	Desired	9	36	7	25	7	30	3	50	6	40
	Unnecessary	7	28	13	46	6	26	2	33	1	7
• 7. Convert decimals to proper fractions.	Required	8	32	7	25	10	44	1	17	8	53
	Desired	10	40	7	25	6	26	3	50	3	20
	Unnecessary	7	28	14	50	7	30	2	33	4	27
8. Convert improper fractions to mixed numbers.	Required	6	24	6	21	9	39	1	17	4	27
	Desired	6	24	7	25	5	22	3	50	6	40
	Unnecessary	13	52	15	54	9	39	2	33	5	33
9. Convert mixed numbers to improper fractions.	Required	6	24	6	21	9	39	1	17	4	27
	Desired	5	20	6	21	4	17	3	50	6	40
	Unnecessary	10	40	9	32	4	17	2	33	1	7
• 10. Round mixed numbers to whole numbers.	Required	9	36	9	32	14	61	1	17	8	57
	Desired	6	24	10	36	5	22	3	50	5	36
	Unnecessary	10	40	9	32	4	17	2	33	1	7
• 11. Compute simple interest.	Required	9	36	9	32	15	65	1	17	4	29
	Desired	7	28	7	25	1	4	3	50	6	43
	Unnecessary	9	36	12	43	7	30	2	33	4	29
12. Convert problems using the standard U.S. of measure.	Required	1	4	1	4	5	22	1	17	4	27
	Desired	8	32	8	29	5	22	4	67	1	7
	Unnecessary	16	64	19	68	13	57	1	17	10	67
• 13. Prepare sales slip.	Required	6	25	12	43	14	61	0	0	7	47
	Desired	2	8	1	4	0	0	4	67	1	7
	Unnecessary	16	67	15	54	9	39	2	33	7	47
14. Solve commission problems.	Required	4	16	7	25	8	35	0	0	3	20
	Desired	2	8	3	11	2	9	4	67	2	13
	Unnecessary	19	76	18	64	13	57	2	33	10	67
15. Solve mark up problems.	Required	4	16	6	21	6	26	0	0	4	27
	Desired	4	16	6	21	4	17	4	67	2	13
	Unnecessary	17	68	16	57	13	57	2	33	9	60
16. Solve mark down problems.	Required	4	16	6	21	5	22	0	0	4	27
	Desired	3	12	6	21	4	17	4	67	2	13
	Unnecessary	18	72	16	57	14	61	2	33	9	60
17. Solve compound interest problems.	Required	3	12	5	18	8	35	0	0	4	27
	Desired	4	16	8	29	6	26	3	50	1	7
	Unnecessary	18	72	15	54	9	39	3	50	10	67
18. Complete an invoice.	Required	8	32	12	43	15	65	0	0	10	67
	Desired	5	20	5	18	2	9	4	67	1	7
	Unnecessary	12	48	11	39	6	26	2	33	4	27

• Objectiv [illegible] test are completed for this task.

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Demonstrate correct ten-key calculator techniques

PERFORMANCE OBJECTIVE:

Given a multi-item exercise containing digits 0 through 9 and the decimal, the student will demonstrate correct ten-key calculator techniques by using the touch method of operation while solving problems using a ten-key calculator.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note that two evaluation forms have been provided. Both instruments will evaluate the objective. You will want to choose only one based upon time allowance and personal preference.

TOUCH-METHOD CHECKLIST

	Acceptable	Unacceptable
Correct fingering for either left or right hand	________	________
Eyes on copy	________	________

DETAILED TOUCH-METHOD CHECKLIST

	Acceptable	Unacceptable
Fingers begin from home position	__________	__________
Fingers return to home keys when inactive	__________	__________
Proper fingering used on all keys	__________	__________
Eyes remain on copy during keyboarding	__________	__________
A position maintainer is used whenever possible	__________	__________

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASKS: Solve math problems consisting of whole numbers

PERFORMANCE OBJECTIVE:

Given a 20-item objective test, containing five addition, five subtraction, five multiplication, and five division problems, and a ten-key calculator, the student will solve these math problems consisting of whole numbers. At least four of the five problems in each category must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

MATH COMPETENCY TEST ON WHOLE NUMBERS

Directions: Solve the following problems as indicated and record your answer on the appropriate line.

Addition

1.	2.	3.	4.	5.
23	765	827	8,102	7,247
34	419	300	6,454	18,659
76	326	847	3,621	3,231
85	425	555	9,069	76,032
____	____	____	____	____

Subtraction

1.	2.	3.	4.	5.
47	384	709	301	3,234
-26	-34	-257	-289	-1,987
____	____	____	____	____

Multiplication

1.	2.	3.	4.	5.
22	47	347	807	1,237
x 7	x28	x30	x356	x802
____	____	____	____	____

Division

1. 1,218 : 6 = ______

2. 288 : 32 = ______

3. 2,790 : 62 = ______

4. 144 : 12 = ______

5. 15,525 : 345 = ______

KEY TO TEST ON PAGE 5

1. 218
2. 1,935
3. 2,529
4. 27,246
5. 105,169
6. 21
7. 350
8. 452
9. 12
10. 1,247
11. 154
12. 1,316
13. 10,410
14. 287,292
15. 992,074
16. 203
17. 9
18. 45
19. 12
20. 45

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Solve math problems consisting of decimal numbers

PERFORMANCE OBJECTIVE:

Given a 20-item objective test, containing five addition, five subtraction, five multiplication, and five division problems, and a ten-key calculator, the student will solve these problems consisting of decimal numbers. At least four of the five problems in each category must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

MATH COMPETENCY TEST ON DECIMAL NUMBERS

Directions: Solve the following problems as indicated and record your answer on the appropriate line. Answers should be carried to the appropriate number of decimal places indicated by each problem.

Addition

1.	2.	3.	4.	5.
345.12	34.78	56.24	356.72	92.90
786.34	62.13	29.98	25.77	261.25
654.76	51.24	80.55	8.16	10.10
431.48	89.31	75.97	419.00	7.02

Subtraction

1.	2.	3.	4.	5.
934.12	893.80	6.38	81.07	675.01
-365.23	-867.35	-4.55	- 2.10	- 75.01

Multiplication

1.	2.	3.	4.	5.
418.25	33.23	9.21	9.36	.071
x 2.30	x .75	x .24	x .4	x 3.09

Division

1. 375.60 : 5 = ______

2. 1,295.82 : 3.45 = ______

3. 3,066 : .3 = ______

4. .0532 : 8 = ______

5. 2.807 : .06 = ______

KEY TO TEST ON PAGE 8

1. 2,217.70
2. 237.46
3. 242.74
4. 809.65
5. 371.27
6. 568.89
7. 26.45
8. 1.83
9. 78.97
10. 600.00
11. 961.98
12. 24.92
13. 2.21
14. 3.74
15. .22
16. 71.52
17. 375.60
18. 10,220.00
19. .67
20. 46.78

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Solve math problems consisting of mixed numbers using a ten-key machine

PERFORMANCE OBJECTIVE:

Given a 20-item test consisting of five addition, five subtraction, five multiplication, and five division problems, and a ten-key calculator, the student will solve the problems consisting of mixed numbers. At least 4 out of 5 in each category must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

MATH COMPETENCY TEST ON MIXED NUMBERS

Solve the following problems using a ten-key calculator. Remember to round the decimal equivalents of fractions to five decimal places and final answers to two decimal places.

Add as indicated.

1. 5 5/8 4 7/16	2. 6 3/20 15 2/5	3. 14 1/6 29 2/5 27 5/12	4. 46 2/9 23 1/2 19 7/15	5. 39 3/25 42 1/6 10 9/10

Subract as indicated.

1. 37 3/10 - 5 2/3	2. 23 5/12 -12 4/5	3. 85 1/6 -49 7/8	4. 63 9/16 -58 5/6	5. 93 2/15 -64 7/9

Find the products.

1. 1 2/5 X 5/8 2. 6 3/4 X 4 3. 13 1/3 X 3 3/5

4. 4 1/2 X 2 2/15 X 3 1/9 5. 1 4/5 X 2 3/8 X 16/27 X 6 2/3

Divide as indicated.

1. 2 3/4 ÷ 2 3/8 2. 2 5/8 ÷ 1 5/12 3. 1 1/6 ÷ 2 2/3

4. 4 4/5 ÷ 2 2/5 5. 175 1/2 ÷ 2 1/4

MATH COMPETENCY TEST ON MIXED NUMBERS
KEY

Solve the following problems using a ten-key calculator. Remember to round the decimal equivalents of fractions to five decimal places and final answers to two decimal places.

Add as indicated.

1.	5 5/8	2.	6 3/20	3.	14 1/6	4.	46 2/9	5.	39 3/25
	4 7/16		15 2/5		29 2/5		23 1/2		42 1/6
	10.06		21.55		27 5/12		19 7/15		10 9/10
					70.98		89.19		92.19

Subract as indicated.

1.	37 3/10	2.	23 5/12	3.	85 1/6	4.	63 9/16	5.	93 2/15
	- 5 2/3		-12 4/5		-49 7/8		-58 5/6		-64 7/9
	31.63		10.62		35.32		4.73		28.36

Find the products.

1. 1 2/5 X 5/8 = .88 2. 6 3/4 X 4 = 27.00 3. 13 1/3 X 3 3/5 = 48.00

4. 4 1/2 X 2 2/15 X 3 1/9 = 31.79 5. 1 4/5 X 2 3/8 X 16/27 X 6 2/3 = 16.89

Divide as indicated.

1. 2 3/4 ÷ 2 3/8 = 1.16 2. 2 5/8 ÷ 1 5/12 = 1.85 3. 1 1/6 ÷ 2 2/3 = .44

4. 4 4/5 ÷ 2 2/5 = 2.00 5. 175 1/2 ÷ 2 1/4 = 78.00

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Round numbers to designated decimal places

PERFORMANCE OBJECTIVE:

Given a six-item objective test, containing three decimal problems and three dollars and cents problems, and a ten-key calculator, the student will round the figures to the designated decimal place. At least five of the six problems must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

MATH COMPETENCY TEST ON DECIMAL PLACES

Directions: On the following problems, round the figures to two decimal places and record your answer on the appropriate line.

1. 23.145 = ________
2. 14.2346 = ________
3. 18.376 = ________
4. $22.221 = ________
5. $89.0553 = ________
6. $6.3145 = ________

KEY TO TEST OF PAGE 14

1. 23.15
2. 14.23
3. 18.38
4. $22.22
5. $89.06
6. $6.31

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Compute cash discounts

PERFORMANCE OBJECTIVE:

Given a six-item objective test, containing three invoice problems and three dollars and cents problems, and a ten-key calculator, the student will compute cash discounts. At lease five of the six problems must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

MATH COMPETENCY TEST ON CASH DISCOUNTS

Directions: Solve the following cash discount problems and record your answer on the appropriate line. Round answers to two decimal places.

	Date of Invoice	Amount of Invoice	Terms	Date Paid	Cash Discount
1.	July 15	$500	2/10 n/30	July 23	______
2.	April 5	$775	2/10 n/60	April 10	______
3.	October 3	$420	3/10 n/30	October 9	______

4. $85.75 less a 50% discount = ______

5. $63.80 less a 25% discount = ______

6. $225 less a 30% discount = ______

KEY TO TEST ON PAGE 17

1. $10
2. $15.50
3. $12.60
4. $42.87
5. $47.85
6. $157.50

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Convert proper fractions to decimals

PERFORMANCE OBJECTIVES:

Given 10 fractions, the student will convert proper fractions to decimals. 8 out of 10 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page.

MATH COMPENTENCY TEST ON
CONVERTING FRACTIONS TO DECIMALS

Directions: Convert the following fractions to decimal equivalents, round off the decimal equivalents to five decimal places. Record your answer on the appropriate line.

1. 3/8 ______________ 6. 1/6 ______________
2. 3/4 ______________ 7. 1/4 ______________
3. 1/8 ______________ 8. 7/10 ______________
4. 1/2 ______________ 9. 3/8 ______________
5. 2/3 ______________ 10. 4/5 ______________

KEY TO TEST ON PAGE 20

1. .37500
2. .75000
3. .12500
4. .50000
5. .66667
6. .16667
7. .25000
8. .70000
9. .37500
10. .80000

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Convert decimals to proper fractions

PERFORMANCE OBJECTIVE:

Given 18 decimal problems, the student will convert decimals to proper fractions. 15 of the 18 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page.

MATH COMPETENCY TEST ON
CONVERTING DECIMALS TO PROPER FRACTIONS

Directions: Change each of the following decimals to an equivalent proper fraction in its lowest form, recording each answer on the appropriate line.

1. 0.37 __________
2. 0.85 __________
3. 0.085 __________
4. 0.064 __________
5. 0.075 __________
6. 0.125 __________
7. 0.48 __________
8. 0.025 __________
9. 0.1875 __________
10. 0.0375 __________
11. 0.625 __________
12. 0.45 __________
13. 0.028 __________
14. 0.325 __________
15. 0.17 __________
16. 0.86
17. 0.0276 __________
18. 0.148 __________

*Source--Applied Business Mathematics, Southwestern Publishing Co., 11th Edition

KEY TO TEST ON PAGE 23

1. 37/100
2. 17/20
3. 17/200
4. 8/125
5. 3/40
6. 1/8
7. 12/25
8. 1/40
9. 3/16
10. 3/80
11. 5/8
12. 9/20
13. 7/250
14. 13/40
15. 17/100
16. 43/50
17. 69/2,500
18. 37/250

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Round mixed numbers to whole numbers

PERFORMANCE OBJECTIVE:

Given 15 mixed numbers, the student will round mixed numbers to whole numbers. 12 out of 15 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page.

MATH COMPETENCY TEST ON
ROUNDING MIXED NUMBERS TO WHOLE NUMBERS

Directions: Round off each mixed number to its nearest whole number, recording each answer on the appropriate line.

1. 7 3/8 ________
2. 9 3/16 ________
3. 18 2/3 ________
4. 16 3/4 ________
5. 13 5/8 ________
6. 8 1/8 ________
7. 7 1/6 ________
8. 18 1/4 ________
9. 43 1/3 ________
10. 25 1/4 ________
11. 18 3/4 ________
12. 8 5/8 ________
13. 10 3/5 ________
14. 9 2/5 ________
15. 10 7/8 ________

*Source--Applied Business Mathematics, Southwestern Publishing Co., 11th Edition.

KEY TO TEST ON PAGE 26

1. 7
2. 9
3. 19
4. 17
5. 14
6. 8
7. 7
8. 18
9. 43
10. 25
11. 19
12. 8
13. 11
14. 9
15. 11

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Demonstrate knowledge of simple interest computations.

PERFORMANCE OBJECTIVE:

Given 16 simple interest problems, the student will demonstrate knowledge of simple interest computations. 13 of the 15 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page.

MATH COMPETENCY TEST ON
COMPUTING SIMPLE INTEREST

Directions: Compute simple interest on problems 1-16. Remember to round the decimal equivalents of fractions to five decimal places and final answers to two decimal places.

	Principal	Rate	Time		Interest
1	$4,250	16%	60 days	=	
2	3,045	14 3/8%	150 days	=	
3	6,675	13 1/2%	90 days	=	
4	4,826	15 1/6%	1 yr., 15 days	=	
5	540	11%	30 days	=	
6	2,250	12 1/4%	120 days	=	
7	950	13 3/4%	45 days	=	
8	392	16 5/12%	240 days	=	
9	$2,700	16 1/2%	60 days	=	
10	5,278	12 1/4%	136 days	=	
11	3,204	10 3/4%	45 days	=	
12	9,584	14 3/8%	1 yr., 60 days	=	
13	645	15 1/2%	30 days	=	
14	6,236.47	12 1/2%	240 days	=	
15	3,580.26	11 3/4%	90 days	=	
16	5,074.83	15 7/8%	2 years	=	

*Source--Electronic Display-Printing Calculator, Southwestern, 1st Edition.

KEY TO TEST ON PAGE 29

	Principal	Rate	Time		Interest
1	$4,250	16%	60 days	=	$113.33
2	3,045	14 3/8%	150 days	=	$182.38
3	6,675	13 1/2%	90 days	=	$225.28
4	4,826	15 1/6%	1 yr., 15 days	=	$762.46
5	540	11%	30 days	=	$4.95
6	2,250	12 1/4%	120 days	=	$91.88
7	950	13 3/4%	45 days	=	$16.33
8	392	16 5/12%	240 days	=	$42.90
9	$2,700	16 1/2%	60 days	=	$74.25
10	5,278	12 1/4%	136 days	=	$244.25
11	3,204	10 3/4%	45 days	=	$43.05
12	9,584	14 3/8%	1 yr., 60 days	=	$1,607.32
13	645	15 1/2%	30 days	=	$8.33
14	6,236.47	12 1/2%	240 days	=	$519.71
15	3,580.26	11 3/4%	90 days	=	$105.17
16	5,074.83	15 7/8%	2 years	=	$1,611.26

COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Demonstrate knowledge of sales slip preparation

PERFORMANCE OBJECTIVE:

Given 5 sales slips, the student will demonstrate knowledge of sales slips preparation. 4 out of 5 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page.

When you buy something at a store, the salesperson usually gives you a sales slip. The sales slip shows what you bought and the total cost of the sale.

1

Music Tower 110 Ranger Avenue
Austin, TX 78711

SOLD TO Alice Haney DATE 1/5 19--
ADDRESS 601 Lake Drive
CITY Austin STATE Texas ZIP 78743

CLERK	CASH	CHARGE	TAKE	SEND

QTY.	DESCRIPTION	UNIT PRICE	AMOUNT
2	Tape packs	1.49	
4	Stereo tapes	7.95	
3	Albums	6.49	
5	Music books	3.75	
40	ft. speaker cable	.09	

2

16 Tenth Avenue
Madison, WI 53715 **BRADSHAW'S**

SOLD TO Elisa Heath DATE 7/28 19--
ADDRESS 1010 Ambrose Street
CITY Madison STATE WI ZIP 53715

CLERK	CASH	CHARGE	TAKE	SEND

QTY.	DESCRIPTION	UNIT PRICE	AMOUNT
6	fitted sheets	7.95	
4	pillow cases	2.98	
2	blankets	24.90	
12	napkins	1.78	
3	tablecloths	14.50	

Directions:

1. Complete sales slip No. 1 above. Make the extensions by multiplying each quantity by the price, and find the total sale.

2. Fill in sales slip No. 2 the way you did No. 1.

3. Fill in the sales slip at the right with these data: Sold to K. Kropov, 234 West Street, Lancaster, PA 17600.

8 boxes of nails @ $.79
6 liters of oil @ $.69
4 sets of hinges @ $1.07
3 wall plates @ $.88
5 brushes @ $1.53

Use the current date.

3

Crossroads Hardware
14th at Main
Lancaster, PA 17600

SOLD TO ______ DATE ______ 19__
ADDRESS ______
CITY ______ STATE ______ ZIP ______

CLERK	CASH	CHARGE	TAKE	SEND

QTY.	DESCRIPTION	UNIT PRICE	AMOUNT

4. Complete the sales slip below from these data: Sold to Delhi Cafeteria, Cooper St., City: 15 kg flour @ 58¢; 8 kg frankfurters @ $3.72; 9 cans beans @ 41¢; 6 pkg. chili mix @ 37¢. Use today's date.

CORBLY'S MARKET

DATE ______________ 19____

SOLD TO ______________________________

ADDRESS ______________________________

CLERK	CASH	CHARGE	TAKE	SEND	UNIT PRICE	AMOUNT	
QTY.	DESCRIPTION						

5. Complete the sales slip below using these data: Sold to Mia Carlew, 617 Lake Road, City; 3 shirts @ $15.70; 3 pair jeans @ $16.90; 6 handkerchiefs @ $1.25; 2 ties @ $8.80. Use today's date.

THE FASHION SHOP

DATE ______________ 19____

SOLD TO ______________________________

ADDRESS ______________________________

CLERK	CASH	CHARGE	TAKE	SEND	UNIT PRICE	AMOUNT	
QTY.	DESCRIPTION						

KEY TO TEST ON PAGE 32

1

Music Tower
110 Ranger Avenue
Austin, TX 78711

SOLD TO Alice Haney DATE 1/5 19--
ADDRESS 601 Lake Drive
CITY Austin STATE Texas ZIP 78745

CLERK	CASH	CHARGE	TAKE	SEND

QTY.	DESCRIPTION	UNIT PRICE	AMOUNT	
2	Tape packs	1.49	[illegible]	[illegible]
4	Stereo tapes	7.95	31	80
3	Albums	6.49	19	47
5	Music books	3.75	18	75
40	ft. speaker cable	.09	3	60
			[illegible]	[illegible]

2

16 Tenth Avenue
Madison, WI 53715
BRADSHAW'S

SOLD TO Elisa Heath DATE 7/28 19--
ADDRESS 1010 Ambrose Street
CITY Madison STATE WI ZIP 53715

CLERK	CASH	CHARGE	TAKE	SEND

QTY.	DESCRIPTION	UNIT PRICE	AMOUNT	
6	fitted sheets	7.95	47	70
4	pillow cases	2.98	11	92
2	blankets	24.90	49	80
12	napkins	1.78	21	36
3	tablecloths	14.50	43	50
			[illegible]	[illegible]

3

Crossroads Hardware
14th at Main
Lancaster, PA 17600

SOLD TO [illegible] DATE [illegible] 19--
ADDRESS [illegible] West Street
CITY Lancaster STATE PA ZIP [illegible]

CLERK	CASH	CHARGE	TAKE	SEND

QTY.	DESCRIPTION	UNIT PRICE	AMOUNT	
[illegible]	[illegible] nails	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
4	[illegible] hinges	1.07	4	[illegible]
3	[illegible]	[illegible]	2	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
			[illegible]	[illegible]

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KEY TO TEST ON PAGE 33

4.

CORBLY'S MARKET

DATE Current 19--
SOLD TO Delhi Cafeteria
ADDRESS Cooper St., City

CLERK | CASH | CHARGE | TAKE | SEND

QTY.	DESCRIPTION	UNIT PRICE	AMOUNT	
15	lbs. flour	.58	8	70
8	lbs. frankfurters	3.72	29	76
9	cans beans	.41	3	69
6	pkgs. chili mix	.37	2	22
			44	37

5.

THE FASHION SHOP

DATE Current 19--
SOLD TO Mia Carteur
ADDRESS 617 Lake Road, City

CLERK | CASH | CHARGE | TAKE | SEND

QTY.	DESCRIPTION	UNIT PRICE	AMOUNT	
3	shirts	15.70	47	10
3	pair jeans	16.90	50	70
6	handkerchiefs	1.25	7	50
2	Ties	8.80	17	60
			122	90

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COMPETENCY AREA: MATH AND CALCULATOR SKILLS

TASK: Complete an invoice

PERFORMANCE OBJECTIVE:

Given 3 invoices, the student will complete the invoices. All invoices must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages.

As you know, retail stores often use sales slips when they sell goods. Wholesalers often use a form like the one below, called a sales invoice. Invoices may be filled out by hand, typewriter, billing machine, or some kind of automated equipment.

Colby Building Supply Co.

327 Hoffman Avenue
Buffalo, NY 14298

DATE October 17, 19--

SOLD TO
Prusko Hardware Store
32 Sisto Street
Buffalo, NY 14299

INVOICE T-5732

INVOICE NO.	CUSTOMER ORDER	TERMS	SHIPPED BY	PREPAID OR COLLECT
63B14	No. 2271	3/10, n/30	Our truck	Prepaid

QUANTITY	DESCRIPTION	PRICE	AMOUNT
2 doz.	Hammers	72.96	....
5 cases	Paint	36.00	....
50 sheets	Wall panel	5.95	....
15	Lights	18.90	....
	Total		....

1. The sales invoice above is complete except for the extended total for each item and the total for the invoice. You are to (a) make each extension, and (b) show the total of the invoice.

2. The invoice in Problem 1 was paid by check on October 26. The amount of the check was $________.

2. Calley's Hardware buys from Mareno's Garden Supply the merchandise listed in the invoice at the right. The shipment weighs 1,855 pounds, and the truck freight is $6.20 per 100 pounds.

You are to complete the invoice by showing (a) the amount of the trade discount, (b) the invoice price, (c) the freight cost, and (d) the total of the invoice.

Mareno's Garden Supply

323 King Street
Los Angeles, CA 90046

SOLD TO Calley's Hardware
122 Garner Avenue
Sacramento, CA 95680

SHIPPED VIA	DATE	INVOICE NO.	YOUR ORDER	F.O.B.	TERMS
Truck	Feb. 27, 19--	C4104	743	Los Angeles	2/10, n/30

QUANTITY	STOCK NO.	DESCRIPTION	UNIT PRICE	AMOUNT	
10	415x	Wheelbarrows	64.50	645.00	
12	A182	Lawnmowers	229.80	2,757.60	
15	BW107	Power edgers	48.50	727.50	4,130.10
		Less 40% and 10%		(a)	....
				(b)	....
		Freight		(c)	....
				(d)	....

3. On this invoice, show the (a) extensions, (b) total list price, (c) trade discount, (d) invoice price, and (e) total of the invoice.

Daltex Wholesale Food Co.

City Square • Dallas, TX 75298

Handy Food Mart
52 Mostek Avenue
Dallas, TX 75290

INVOICE NO. BG-14

SHIP VIA Fast Express

DATE June 2, 19--

TERMS 2/10, n/30

QUANTITY	DESCRIPTION	UNIT PRICE	EXTENSION	TOTAL
4 cases	Canned peas	16.80	....	
50 lb.	Franks	1.45	....	
16 cases	Soda	5.40	....	....
	Less 25% and 10%			....
				....
	Express Prepaid			9.25
				....

KEY TO TEST ON PAGE 37

Colby Building Supply Co.

327 Hoffman Avenue
Buffalo, NY 14298

DATE October 17, 19--

SOLD TO
Prusko Hardware Store
32 Sisto Street
Buffalo, NY 14299

INVOICE T-5732

INVOICE NO.	CUSTOMER ORDER	TERMS	SHIPPED BY	PREPAID OR COLLECT
63B14	No. 2271	3/10, n/30	Our truck	Prepaid

QUANTITY	DESCRIPTION	PRICE	AMOUNT
2 doz.	Hammers	72.96	145.92
5 cases	Paint	36.00	180.00
50 sheets	Wall panel	5.95	297.50
15	Lights	18.90	283.50
	Total		906.92

The invoice in Problem 1 was paid by check on October 26. The amount of the check was $ 879.71

$906.92 − (0.03 × $906.92) = $879.71 amount of check

KEY TO TEST ON PAGE 38

2.

Mareno's Garden Supply

323 King Street
Los Angeles, CA 90046

SOLD TO Calley's Hardware
122 Garner Avenue
Sacramento, CA 95680

SHIPPED VIA	DATE	INVOICE NO.	YOUR ORDER	F.O.B.	TERMS
Truck	Feb. 27, 19--	C4104	743	Los Angeles	2/10, n/30

QUANTITY	STOCK NO.	DESCRIPTION	UNIT PRICE	AMOUNT	
10	415x	Wheelbarrows	64.50	645.00	
12	A182	Lawnmowers	229.80	2,757.60	
15	BW107	Power edgers	48.50	727.50	4,130.10
		Less 40% and 10%		(a)	1,899.85
				(b)	2,230.25
		Freight		(c)	115.01
				(d)	2,345.26

3.

Daltex Wholesale Food Co.

City Square • Dallas, TX 75298

Handy Food Mart
52 Mostek Avenue
Dallas, TX 75290

INVOICE NO. BG-14 **SHIP VIA** Fast Express

DATE June 2, 19-- **TERMS** 2/10, n/30

QUANTITY	DESCRIPTION	UNIT PRICE	EXTENSION	TOTAL
4 cases	Canned peas	16.80	67.20	
50 lb.	Franks	1.45	72.50	
16 cases	Soda	5.40	86.40	226.10
	Less 25% and 10%			73.48
				152.62
	Express Prepaid			9.25
				161.87

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ORGANIZATION/TIME MANAGEMENT SKILLS

TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
* 1. Organize work stations.	Required	23	92	21	75	20	87	4	67	14	93
	Desired	2	8	5	18	2	9	2	33	1	7
	Unnecessary	0	0	2	7	1	4	0	0	0	0
* 2. Set priorities.	Required	22	88	20	71	23	100	5	83	14	93
	Desired	3	12	7	25	0	0	1	17	1	7
	Unnecessary	0	0	1	4	0	0	0	0	0	0
* 3. Make travel arrangements and complete related documents and reports.	Required	14	56	7	25	8	35	0	0	7	47
	Desired	7	28	13	46	6	26	2	33	5	33
	Unnecessary	4	16	8	29	9	39	4	67	3	20
* 4. Maintain a desk calendar.	Required	20	80	18	64	18	78	2	33	9	60
	Desired	4	16	6	22	5	22	3	50	5	33
	Unnecessary	1	4	4	14	0	0	1	17	1	7
* 5. Maintain a tickler file.	Required	15	60	13	46	10	44	1	17	5	33
	Desired	8	32	12	43	9	39	4	67	4	27
	Unnecessary	2	8	3	11	4	17	1	17	6	40
* 6. Record merchandise or stock inventory.	Required	7	28	8	29	9	39	3	50	6	40
	Desired	6	24	7	25	4	17	3	50	3	20
	Unnecessary	12	48	13	46	10	44	0	0	6	40

* Objective and test are completed for this task.

COMPETENCY AREA: ORGANIZATION/TIME MANAGEMENT

TASK: Organize work station

PERFORMANCE OBJECTIVE:

Given a list of equipment/supplies to be used in setting up a work station, the student will organize a work station. A checklist will be used to evaluate performance. All items must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

ORGANIZE WORK STATION TEST

You are shown your new office. It is attractive with good lighting. Using the following equipment, set up your work station. Use a blank sheet of paper and draw your work station indicating the placement of each of the items.

1. Typewriter
2. Telephone
3. File cabinets
4. Rolodex
5. Desk trays for incoming and outgoing mail
6. Stapler
7. Desk calendar
8. Reference books
9. Pens/pencils

CHECKLIST FOR ORGANIZE WORK STATION

	Acceptable	Unacceptable
1. Neat desk arrangement		
2. Efficient equipment arrangement		
3. Student can easily find everything		

COMPETENCY AREA: ORGANIZATION/TIME MANAGEMENT

TASK: Set priorities

PERFORMANCE OBJECTIVE:

Given a list of 10 tasks to be completed, the student will set priorities by listing the tasks in order of priority. At least 7 out of 10 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: This is a terminal objective--be sure to indicate in class discussion on need/importance for setting priorities and that they change with different work situations; i.e., boss is on vacation, new task is assigned, additional project must be completed, etc.

SETTING PRIORITIES COMPETENCY TEST

Make decisions on priorities and record those decisions on the Work Priority sheet, which is your answer sheet. The instructions may not always be as explicit as you would like; however, this is done on purpose to test your judgement and initiative.

Situation:

You are Marion Meyers, Secretary to Ms. Ann Johnson, Vice President of Personnel for Mid-Continent Industries, 1300 Wyandotte, Kansas City, Missouri 64105. Your position involves various office activities such as collecting and organizing necessary materials or information for reports, maintaining a variety of office records, composing and signing routine correspondence and taking and transcribing dictation.

You handle telephone calls, correspondence and meetings with persons in other departments in order to obtain or supply factual information. You consult your employer only when clarification or interpretation of organizational policy is in question. You are also responsible for the supervision of several part-time typists, stenographers, and file clerks.

The Immediate Setting:

Ms. Johnson plans to leave the office THIS afternoon, Friday, May 1, to address the New York Chapter of the American Society of Training Directors. She will be a luncheon speaker at noon on May 2. She will return to the office on May 5. While she is away, you will be expected to complete correspondence and other office duties related to the daily operation of the department.

Since you were attending a seminar at the Hallcraft Crown Center this morning, you stop by the office this afternoon at 2 p.m. to check the mail and to make certain Ms. Johnson is prepared for her departure from the office at 4 p.m. for Kansas City International Airport. Certain high priority items must be completed this afternoon. These items and others are included in this packet.

Calendar:

MAY

S	M	T	W	TH	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Directions:

1. Code each of the items by priority

2. In the blanks in the last column place the item identifying letters in order, beginning with the highest priority item in the first blank and the lowest priority item in the last blank.

WORK PRIORITY SHEET

Priority Code

1. Do this afternoon
2. Do before Ms. Johnson returns
3. Do as soon as possible

Item Number	Priority Code	Order
A	___	___
B	___	___
C	___	___
D	___	___
E	___	___
F	___	___
G	___	___
H	___	___
I	___	___
J	___	___

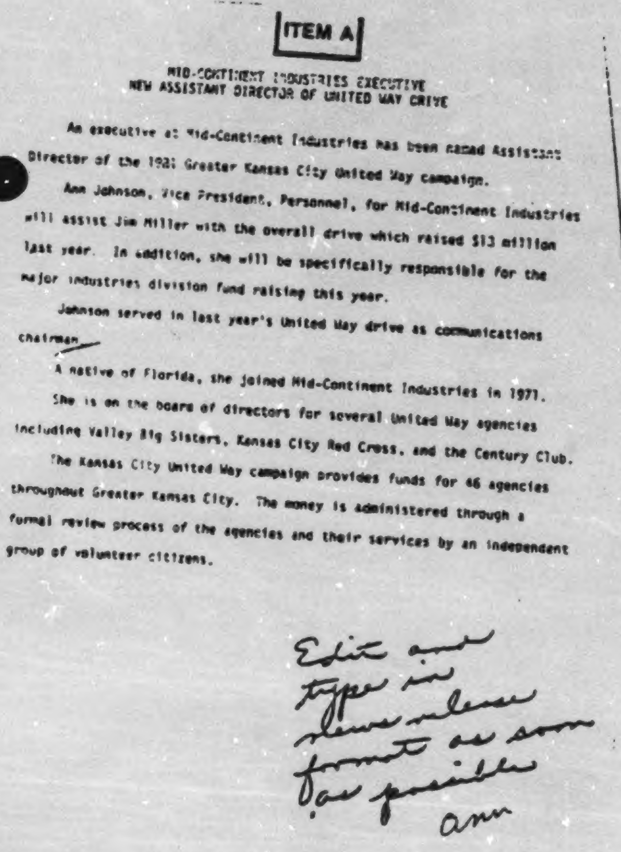
WORK PRIORITY SHEET (Key)

Priority Code

1. Do this afternoon
2. Do before Ms. Johnson returns
3. Do as soon as possible

Item Number	Priority Code	Order
A	2	3
B	2	4
C	1	1
D	3	10
E	2	6
F	1	2
G	3	8
H	3	7
I	2	5
J	3	9

Items to be coded:



ITEM A

MID-CONTINENT INDUSTRIES EXECUTIVE
NEW ASSISTANT DIRECTOR OF UNITED WAY DRIVE

An executive at Mid-Continent Industries has been named Assistant Director of the 1981 Greater Kansas City United Way campaign.

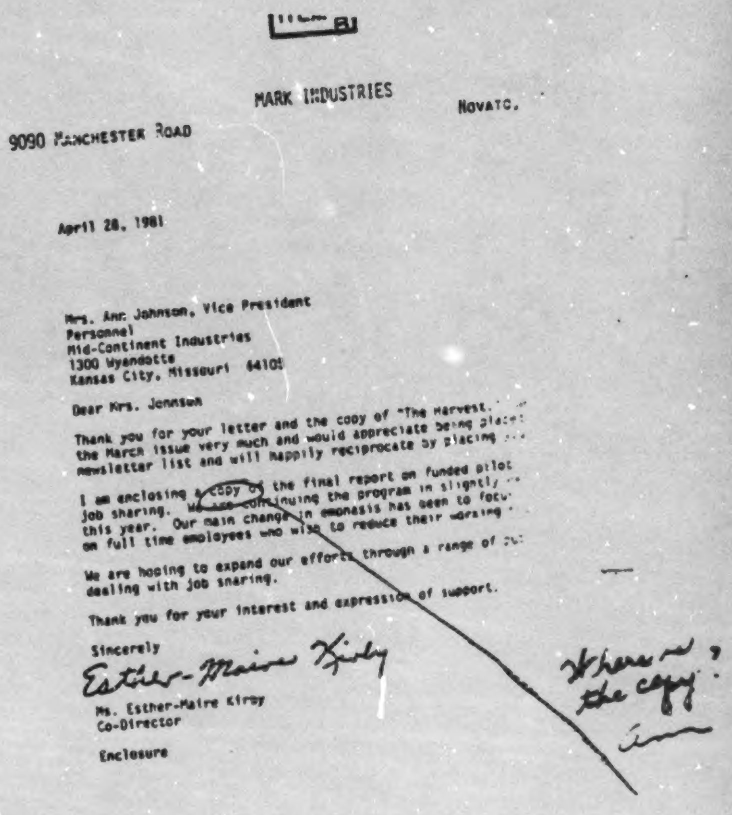
Ann Johnson, Vice President, Personnel, for Mid-Continent Industries will assist Jim Miller with the overall drive which raised $13 million last year. In addition, she will be specifically responsible for the major industries division fund raising this year.

Johnson served in last year's United Way drive as communications chairman.

A native of Florida, she joined Mid-Continent Industries in 1971. She is on the board of directors for several United Way agencies including Valley Big Sisters, Kansas City Red Cross, and the Century Club.

The Kansas City United Way campaign provides funds for 46 agencies throughout Greater Kansas City. The money is administered through a formal review process of the agencies and their services by an independent group of volunteer citizens.

Edit and type in news release format as soon as possible
Ann



ITEM B

MARK INDUSTRIES
9090 MANCHESTER ROAD
NOVATO,

April 28, 1981

Mrs. Ann Johnson, Vice President
Personnel
Mid-Continent Industries
1300 Wyandotte
Kansas City, Missouri 64105

Dear Mrs. Johnson

Thank you for your letter and the copy of "The Harvest." the March issue very much and would appreciate being place newsletter list and will happily reciprocate by placing

I am enclosing a copy of the final report on funded pilot job sharing. We are continuing the program in slightly this year. Our main change in emphasis has been to focu on full time employees who wish to reduce their working

We are hoping to expand our efforts through a range of dealing with job sharing.

Thank you for your interest and expression of support.

Sincerely

Esther-Maire Kirby

Ms. Esther-Maire Kirby
Co-Director

Enclosure

Where is the copy?
Ann

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ITEM C
1 of 4

AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT

1981 CONFERENCE DESIGN COMMITTEE

COMMITTEE FACT SHEET

Committee Goal - Design the 1981 National Conference and implement that design by mobilizing volunteer and community resources and utilizing necessary staff support.

Each Committee member will have at least one specific responsibility but will be expected to operate as part of a team and to give input and assistance to other Committee members throughout the Committee year.

Conference Dates/Location - September 20-25, 1981/ Anaheim, California.

Committee Tenure - From the end of the 1980 Conference through the 1981 Anaheim Conference plus time needed afterwards for volunteer final reports.

Committee Meeting Dates/Locations - 1980 meetings of the Committee are:

Saturday, April 26 - 3:00 P.M. St. Louis Sheraton - Craig Musick's suite. (Preceding the 1980 National Conference).

.Saturday, May 9 - 6:30 P.M. through Sunday, May 11 - ending at 3:30 P.M. Disneyland Hotel, Anaheim, CA.

.Friday, June 13 - 8:30 A.M. through Saturday, June 14 - ending at 4:00 P.M., Denver, Colo. Meeting site to be determined.

.Friday, July 17 - 8:30 A.M. to 5 P.M. Los Angeles/Orange County, Calif. area. Meeting site to be determined.

One 1981 Meeting of the Committee will be held. It probably will be a one-day meeting at the conference site in August 1981.

Committee Member Expenses - Each Committee member is encouraged to find alternative funding sources other than ASTD. If this is not possible, and after submission of individual decision packages, ASTD will reimburse round-trip coach airfare for travel to the Conference Design Committee meetings listed above. Continental breakfast and lunch will be paid for by ASTD during the Committee meetings.

Change L.C. to L.A.
from May 8 to
first direct flight
May 9.
Ann

ITEM C
2 of 4

ASTD REGIONAL CONFERENCE
CHAIRPERSONS' WORKSHOP

Anaheim, California

May 9-10, 1981

SATURDAY, MAY 9

6:30 p.m. - 9:00 p.m .... Disneyland Hotel, Anaheim, California

SUNDAY, MAY 10

8:00 a.m. . . . . Continental Breakfast

8:30 a.m. . . . . Welcome - BRAD MINTENER, Director of Member and Chapter Services (ASTD Staff)

8:30-8:45 a.m. . . . . WHAT IS AN ASTD REGIONAL CONFERENCE? - ED SCANNELL, presiding as Workshop Leader (ASTD National Board Member and Coordinator of Continuing Education, Arizona State University, Tempe)

.purposes and some goals

8:45-9:45 a.m. . . . . HOW AND WHERE DO YOU GET STARTED? - ED SCANNELL

.getting organized
.the committee structure
.the process
.making the conference a regional experience
.starting support from the chapter, region, and national

9:45-10:15 a.m. . . . . DEVELOPING A BUDGET - ED SCANNELL AND GORDON SCHLEICHER, former 1975 Region 5 Conference Coordinator, South Central Michigan Chapter

---

ITEM C
3 of 4

.the elements - publicity, facilities, speakers, equipment handouts
.the sources
.some models
.setting the registration fees
.some checklists

10:15-10:30 a.m. . . . . (Coffee Break)

10:30-11:30 a.m. . . . . DESIGNING THE PROGRAM - CARNIE IVES Connecticut Chapter (Region 1)

.scheduling
.regional inputs
.needs analysis
.specific objectives
.being creative
.balance and integration of elements

11:30-12:00 NOON . . . . THE EXPO - PAUL KLEDZIK, Marketing Director (ASTD Staff)

...ask your questions about:
.advantages
.resources - local, region, national
.some how-tos for planning exhibits: rates, planning commitments

NOON-1:00 p.m. . . . . Lunch

1:00-2:00 p.m. . . . . GETTING THE WORD OUT -

.developing a promotional strategy
.the key elements
.who does it?
.assistance locally, regional, national; who and what? - BRIAN GRAEDEL, Office Services Manager (ASTD Staff) and BRAD MINTENER
.special techniques and ideas
.production and distribution

2:00-2:30 p.m. . . . . THE CONFERENCE FACILITY AND LOGISTICS
Ann Johnson, . Resources

.site selection
.meals
.what to look for
.the little things which count
.the coordination of program, and
.scheduling
.audio, visuals
.registration

ITEM C
4 of 4

2:30-3:00 p.m. . . . . EVALUATION - ED and CARNIE

*3:00-3:30 p.m. . . . . SOME PARTING WORDS AND EXCHANGES - ED, BRAD, and Resources

.we can't do it alone
.working with people and resources

*We will wind up by 3:30 so people can catch planes. We will have transportation for everyone to the airport.

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ITEM D

Hold for staff meeting on May 6

*SECRETARY'S TIME CHARTED FOR TWO DAYS

Administration	
Act as agent by phone or vis-a-vis	13%
Care for office	9%
Make or serve coffee	2%
Handle incoming and outgoing mail--open, scan, stamp, sort	10%
Take directions from or converse with originator	5%
Plan priorities, review backlog, generally decide your agenda	--
Keep financial records	30%
Copy, duplicate documents	1%
Communications on paper and tapes	
Composing letters, transcriptions, editing, proofing	13%
Storage, and retrieval	
Categorize, file or find documents; reorganize files	7%
Personal—originator	
Perform activities not related to the business	2%
Personal--secretary	6%
TOTAL	98%
Errors in charting	2%
	100%

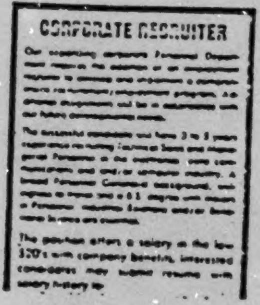
*The Secretary, November 1977, page 10.

ITEM F

ITEM F

MID-CONTINENT INDUSTRIES

1300 Wyandotte
Kansas City, Missouri 64105



CORPORATE RECRUITER

Schedule an appointment for me to see Eleanor Lefleuve on May 5.

ITEM E

SEARCHING FOR A SOLUTION?

If you're searching for a solution to presenting your products to trainers, there's an opportunity you can depend on--EXCELLENT EXHIBITOR SPACE AT THE REGION 7 AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT CONFERENCE. The conference will be held at the Hilton Inn in Albuquerque, New Mexico, on the 9, 10 and 11 of October 1981.

Approximately 150 training directors and specialists responsible for the training and development of today's work force are expected to be in attendance.

As in the past, one of the main attractions of the conference will be the exhibits displayed by the various firms who deal with training materials. You are cordially invited to participate at the conference by presenting your products at one of our display booths. The fee for the booths has been set at $100.00. The booths will be set up by a professional display company and will be 7' x 8' in size.

Additional details will be available on request. We would appreciate hearing from you

Contact: Adam Mitchell
One Park Place
Albuquerque, NM 87106
Telephone 505-986-5602 Ext. 201

Write for information, please.
Ann

ITEM G

Older women face job discrimination

Associated Press

WASHINGTON — More women than ever are going to work because of economic conditions, but discrimination against older working women remains widespread, according to a study released Wednesday.

The survey of more than 200 women 45 years or older was conducted by Working Women, an organization that represents about 10,000 women primarily employed in office jobs.

The survey concluded that the number of older women returning to work was increasing because of economic conditions but that too often they remained "segregated into dead-end jobs," with little chance for advancement beyond clerical or service positions.

Ellen Cassedy, director for the organization's Washington office, said discrimination laws generally appeared sufficient, but were not adequately enforced.

She said older women "face greater barriers in looking for a job" and many were afraid to leave low-paying jobs "because they are rightly afraid of going on the job market after the age of 40."

Mrs. Cassedy also urged changes in pension laws because "most employers are guilty of providing inadequate pension benefits for women."

She said the survey, begun last October, included interviews with more than 200 women in 10 cities and discussions with federal regulatory officials and various experts on aging.

Mrs. Cassedy said there were about 14 million women over 45 in the labor force.

Ann

See me when you have time.

S K

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**ITEM H
1 of 5**

TO: 1981 Conference Speakers

FROM: Fran Lacy, Manager of Conference and Institutes

DATE: April 28, 1981

Thank you for agreeing to participate in ASTD's 36th National Conference, September 20-25, 1981, in Anaheim, California. We appreciate your commitment. The information in this packet is intended to be of help. Included are guidelines for participation, in addition to a timetable of action items.

Please take a few moments to review the materials, jot the action items on your calendar, and note any questions you might have. You'll be hearing from me, and perhaps others involved with the program, periodically during the next several months. Be sure to feel free to contact me at [illegible] you have any questions or concerns. I look forward to

**ITEM H
2 of 5**

TIMETABLE

Further explanation and appropriate forms for the following items are included in this package. Pre-addressed envelopes and labels are enclosed for your convenience.

DATE	ACTION REQUIRED
Immediate	Photograph and biographical sketch to ASTD...(if you haven't already) ✓
Immediate	Hotel reservation request to the Anaheim ASTD Housing Bureau ✓
June 1	Final summary of presentation (100-200 words) to ASTD
	Audio release form to ASTD
	A/V and room set-up requirements to ASTD
July 1	Camera-ready copy of any materials you wish ASTD to print for your session to ASTD
August 1	Check and finalize all details for the Conference... double-check with ASTD on any concerns, questions, etc.
September 20-25	ASTD National Conference

Remind me
of this project
when I return
from NYC.

**ITEM H
3 of 5**

DETAILS ON THE CONFERENCE

DATES

September 20-25, 1981

LOCATION

Anaheim, California

The Anaheim Convention Center will be the center of Conference activities, housing the Training Equipment and Services Exposition, ASTD registration and many of the Conference sessions. Sessions and social functions will also be held at the Disneyland Hotel.

Registrants will be housed at 10-15 different hotel properties in the area. ASTD will provide shuttle bus service between all hotels and the convention center.

PROGRAM

The National Conference program has been designed this year following the direction of ASTD's professional development program. This project is the most significant research to date about the roles and competencies of training and development practitioners. Many of the Conference sessions will relate directly to one of these competencies.

The Conference is a blend of educational sessions, the largest Training & Equipment Services Exposition in the country, and various social activities. ASTD subgroups, caucuses and special interest groups also play a large role in programming the Conference for their specific members' needs and interests.

NON-COMMERCIAL NATURE OF THIS CONFERENCE

ASTD provides a unique forum for open dialogue and creative exchange of ideas among professionals. It is important that the ASTD platform is not used for self-serving promotion of a product or service.

**ITEM H
4 of 5**

Details on the Conference
Page 2

EXPENSES

Because the Conference is an activity of a non-profit educational society, the organizations that speakers represent have underwritten their expenses in the past. This practice will continue in 1981. Limited travel funding is available and special arrangements should be made and confirmed in writing with ASTD, through Fran Lacy. No honorariums will be paid. If travel funding arrangements are agreed on, please submit appropriate receipts within 30 days following the Conference for reimbursement.

GUIDELINES FOR NON-SEXIST PRESENTATIONS

The Women's Caucus of ASTD have prepared guidelines for presenters. We appreciate it if you will review and use them.

PREPARATION FOR YOUR ATTENDANCE AND SESSION (HAND-OUTS)

Take home material is valuable to the participants. Items such as check-lists, charts, forms and bibliographies make good future reference material. ASTD encourages all presenters to have hand-outs and will be happy to reproduce, in quantity, if they are received in the National office by August 1st. Clear, clean visuals are also essential to your presentation. One of the criticisms made in the past was that visuals could not always be read. Please consult an expert, or ask us for help if you need it.

BIOGRAPHICAL MATERIAL AND PHOTOGRAPH

Traditionally, information on all Conference speakers is published for Conference attendees. If you have not already forwarded your biographical information and a glossy black and white photo of yourself (preferrably 5 x 7) to us, please do so immediately. All Conference session presenters are included in this publication.

CHANGE OF ADDRESS OR LISTING

In order to keep all our information up to date, please notify us at once of any change in address or program listing.

A/V AND ROOM SET UP AND EQUIPMENT

ASTD will supply the necessary audio-visual equipment as listed on the enclosed form. Please be sure to return that form to us no later than June 1st.

**ITEM H
5 of 5**

Details on the Conference
Page 3

A/V AND ROOM SET UP AND EQUIPMENT continued

All meeting rooms will be set theater style (chairs only). If the design of your presentation requires a special room arrangement, please let us know. Due to time and labor constraints, it may not always be possible to make multiple changes, however, we will work with you to best accommodate your needs.

AUDIO RELEASE FORM

If your Conference session will lend itself to recording, we'd like to receive your permission to record it on a royalty-free basis for the Audio Cassette series that will be published from this Confere

If you agree to let us tape your session, you will receive one complimentary tape of your presentation, and of course, additiona exposure as a Conference speaker through our Cassette publishing program. (Keep in mind that presentations which are highly visual in their approach do not make good presentations for ta

Please indicate your wishes on the enclosed Audio Tape Authoriza Form, sign it, and return it to us by June 1st.

SPOUSE REGISTRATION

We'll send you further details on the spouse program at a late date. The cost of the program will be $[illegible], and will include Conference activities in addition to special programs planned specifically for spouses of attendees.

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ITEM I

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FILMS ON "PRODUCTIVITY"

MERICAN HERITAGE CENTER National Education Program Harding College Campus rcy, Arkansas 72143 (501) 268-2420	"Why Pay Leapfrog?" plus catalog
CAN SOCIETY TRAINING Box 5307 son, Wisconsin 53705	"Training Film Index"
SNA COMMUNICATIONS, INC. a subsidiary of the Bureau of National Affairs, Inc. 401 Decoverly Hall Road ockville, Maryland 20850 (301) 948-0540	"Making Human Resources Productive" "Motivation and Productivity: A Series." plus catalog
RM PRODUCTIONS, INC. ivision of McGraw-Hill Films 550 Euclid Street anta Monica, Calif. 90404	
HAMBER OF COMMERCE, U. S. 615 H Street, N.W. ashington, D. C. 20062 (202) 659-6183	"The Promise of Productivity" "Will There Always Be an England?"
LLEY CURTIS 11 N. Las Palmas Avenue llywood, California 90038 (213) 467-1101	"The Time of Your Life"
RTNELL CORPORATION 50 Ravenswood Avenue icago, Illinois 60640 (312) 561-4000	"This Matter of Motivation" (basic film plus twelve case study films)
VELOPMENT DIMENSIONS, Inc. 3 Mt. Lebanon Blvd., Suite 419 ttsburgh, Penna. 15234 (412) 343-5655/0616	
RDIAN LIFE INSURANCE Park Avenue South York, New York 10017 (212) 473-3000	"Guardian Life"
J. HENNESSY Palm Avenue th Pasadena, California 91030 (213) 682-2353	"Firestone/23/28"

Order film to preview. And Productivity is important.

ITEM J
1 of 3

Abstract key points for June Keynote speech, please

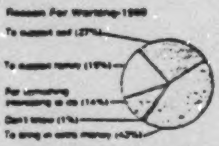
RADITIONAL ROLES OF AMERICAN WOMEN EEN CHANGING IN 1980 VIRGINIA SLIMS POLL

TWIN GOALS FAVORED: MARRIAGE AND CAREER

[illegible]

The Working Women

[illegible]



QUESTION: [illegible]

[illegible]

Equal Chance With Men For Working Women

1980

	Working women say			Men say about working women		
	Equal chance	[illegible]	Don't know	Equal chance	[illegible]	Don't know
Salary	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Responsibility	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Promotion	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Becoming an Executive	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

ITEM J
2 of 3

[illegible]

Marriage Traditions in Flux

[illegible]

Sex Roles and Stereotypes

[illegible]

ITEM J
3 of 3

[illegible] Since this is an election year [illegible] elected President by the year 2000.

Toward Financial Independence

Money is the primary reason why women work. [illegible] from 7% in 1972 to 11% in 1980, savings accounts from 7% in 1972 to 13% in 1980.

[illegible]

[illegible]

Children Out of Wedlock

[illegible]

Alimony/Palimony

[illegible]

Child Custody

[illegible]

Matters of Concern

[illegible]

The personal and social concerns of women today [illegible]

Leisure Time

[illegible]

Fashion

[illegible]

Summary

The 1980 Virginia Slims American Women's Opinion Poll [illegible]

COMPETENCY AREA: ORGANIZATION/TIME MANAGEMENT SKILLS

TASK: Make travel arrangements and complete related documents and reports.

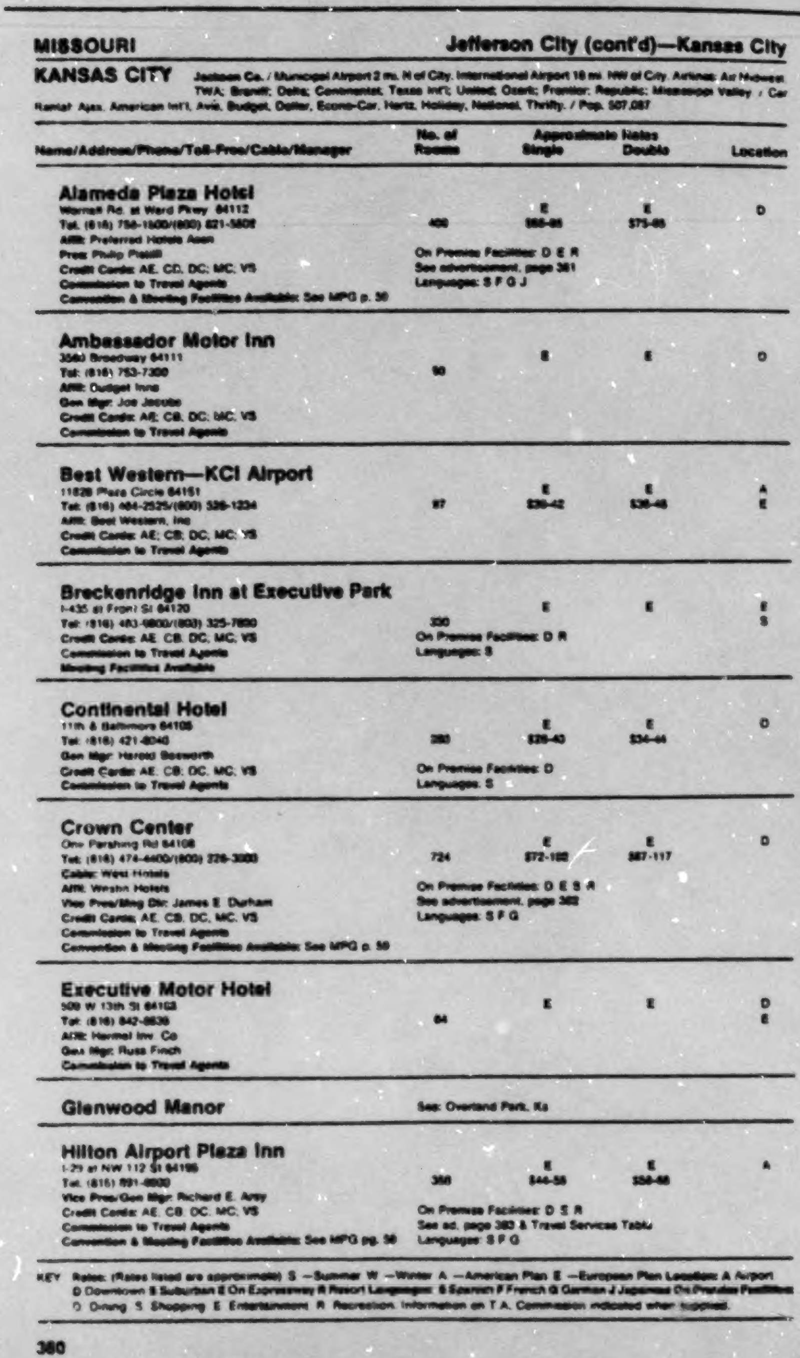
PERFORMANCE OBJECTIVE:

Given a situation, the student will obtain information on flights, hotel accommodations, and travel expenses using excerpts of the Official Airline Guide and Hotel and Motel Red Book to write an itinerary with attached travel expense report. All items should be typed in an acceptable manner.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages.

Travel Arrangements Situation:

Your employer, Mrs. Marie Sanchez, is president of a small office consulting firm in Pittsburgh, Pennsylvania. She needs to meet with a client in Kansas City, Missouri, no later than 10:30 a.m. on Monday, October 14. Mrs. Sanchez will complete her duties by Wednesday, October 16, 5:00 p.m. She prefers a single hotel room in the downtown area with dining and meeting rooms on the premises.

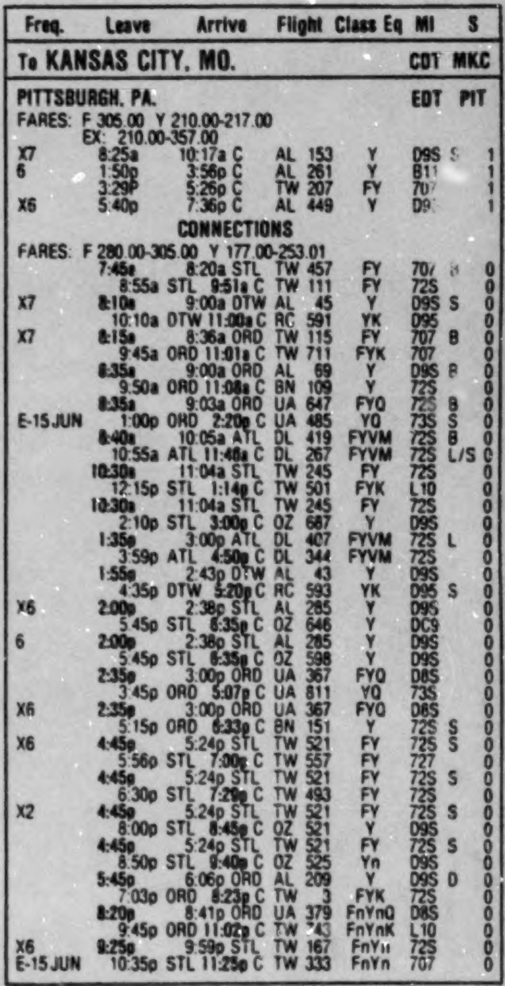


MISSOURI **Jefferson City (cont'd)—Kansas City**

KANSAS CITY Jackson Co. / Municipal Airport 2 mi. N of City. International Airport 18 mi. NW of City. Airlines: Air Midwest; TWA; Braniff; Delta; Continental; Texas Int'l; United; Ozark; Frontier; Republic; Mississippi Valley / Car Rental: Ajax, American Int'l, Avis, Budget, Dollar, Econo-Car, Hertz, Holiday, National, Thrifty. / Pop. 507,087

Name/Address/Phone/Toll-Free/Cable/Manager	No. of Rooms	Approximate Rates		Location
		Single	Double	
Alameda Plaza Hotel Wornall Rd. at Ward Pkwy 64112 Tel. (816) 756-1500/(800) 421-5808 Affil: Preferred Hotels Assn Pres: Philip Pistilli Credit Cards: AE, CD, DC; MC; VS Commission to Travel Agents Convention & Meeting Facilities Available: See MPG p. 30	400 On Premise Facilities: D E R See advertisement, page 381 Languages: S F G J	E $55-65	E $75-85	D
Ambassador Motor Inn 3560 Broadway 64111 Tel: (816) 753-7300 Affil: Budget Inns Gen Mgr: Joe Jacobs Credit Cards: AE; CB; DC; MC; VS Commission to Travel Agents	90	E	E	D
Best Western—KCI Airport 11828 Plaza Circle 64151 Tel: (816) 464-2525/(800) 528-1234 Affil: Best Western, Inc Credit Cards: AE; CB; DC; MC; VS Commission to Travel Agents	87	E $30-42	E $36-48	A E
Breckenridge Inn at Executive Park I-435 at Front St 64120 Tel: (816) 483-9800/(800) 325-7800 Credit Cards: AE, CB, DC, MC, VS Commission to Travel Agents Meeting Facilities Available	330 On Premise Facilities: D R Languages: S	E	E	E S
Continental Hotel 11th & Baltimore 64105 Tel: (816) 421-8040 Gen Mgr: Harold Bosworth Credit Cards: AE, CB, DC, MC, VS Commission to Travel Agents	280 On Premise Facilities: D Languages: S	E $28-40	E $34-44	D
Crown Center One Pershing Rd 64108 Tel: (816) 474-4400/(800) 228-3000 Cable: West Hotels Affil: Westin Hotels Vice Pres/Mng Dir: James E. Durham Credit Cards: AE, CB, DC, MC, VS Commission to Travel Agents Convention & Meeting Facilities Available: See MPG p. 59	724 On Premise Facilities: D E S R See advertisement, page 382 Languages: S F G	E $72-102	E $87-117	D
Executive Motor Hotel 500 W 13th St 64102 Tel: (816) 842-8830 Affil: Hammel Inv. Co Gen Mgr: Russ Finch Commission to Travel Agents	84	E	E	D E
Glenwood Manor	See: Overland Park, Ks			
Hilton Airport Plaza Inn I-29 at NW 112 St 64195 Tel. (816) 891-8900 Vice Pres/Gen Mgr: Richard E. Arey Credit Cards: AE, CB, DC, MC, VS Commission to Travel Agents Convention & Meeting Facilities Available: See MPG pg. 58	350 On Premise Facilities: D S R See ad. page 383 & Travel Services Table Languages: S F G	E $44-56	E $56-68	A

KEY Rates: (Rates listed are approximate) S —Summer W —Winter A —American Plan E —European Plan Location: A Airport D Downtown S Suburban E On Expressway R Resort Languages: S Spanish F French G German J Japanese On Premise Facilities: D Dining S Shopping E Entertainment R Recreation. Information on T.A. Commission indicated when supplied.



To KANSAS CITY, MO. CDT MKC

PITTSBURGH, PA. EDT PIT

FARES: F 305.00 Y 210.00-217.00
EX: 210.00-357.00

Freq.	Leave	Arrive	Flight	Class	Eq	Ml	S
X7	8:25a	10:17a C	AL 153	Y	D9S	S	1
6	1:50p	3:56p C	AL 261	Y	B11		1
	3:29P	5:26p C	TW 207	FY	707		1
X6	5:40p	7:36p C	AL 449	Y	D9S		1

CONNECTIONS

FARES: F 280.00-305.00 Y 177.00-253.01

Freq.	Leave	Arrive	Flight	Class	Eq	Ml	S
	7:45a	8:20a STL	TW 457	FY	707	B	0
	8:55a STL	9:51a C	TW 111	FY	72S		0
X7	8:10a	9:00a DTW	AL 45	Y	D9S	S	0
	10:10a DTW	11:00a C	RC 591	YK	D95		0
X7	8:15a	8:36a ORD	TW 115	FY	707	B	0
	9:45a ORD	11:01a C	TW 711	FYK	707		0
	8:35a	9:00a ORD	AL 69	Y	D9S	B	0
	9:50a ORD	11:08a C	BN 109	Y	72S		0
	8:35a	9:03a ORD	UA 647	FYQ	72S	B	0
E-15 JUN	1:00p ORD	2:20p C	UA 485	YQ	73S	S	0
	8:40a	10:05a ATL	DL 419	FYVM	72S	B	0
	10:55a ATL	11:48a C	DL 267	FYVM	72S	L/S	0
	10:30a	11:04a STL	TW 245	FY	72S		0
	12:15p STL	1:14p C	TW 501	FYK	L10		0
	10:30a	11:04a STL	TW 245	FY	72S		0
	2:10p STL	3:00p C	OZ 687	Y	D9S		0
	1:35p	3:00p ATL	DL 407	FYVM	72S	L	0
	3:59p ATL	4:50p C	DL 344	FYVM	72S		0
	1:55p	2:43p DTW	AL 43	Y	D9S		0
	4:35p DTW	5:20p C	RC 593	YK	D95	S	0
X6	2:00p	2:38p STL	AL 285	Y	D9S		0
	5:45p STL	6:35p C	OZ 646	Y	DC9		0
6	2:00p	2:38p STL	AL 285	Y	D9S		0
	5:45p STL	6:35p C	OZ 598	Y	D9S		0
	2:35p	3:00p ORD	UA 367	FYQ	D8S		0
	3:45p ORD	5:07p C	UA 811	YQ	73S		0
X6	2:35p	3:00p ORD	UA 367	FYQ	D8S		0
	5:15p ORD	6:33p C	BN 151	Y	72S	S	0
X6	4:45p	5:24p STL	TW 521	FY	72S	S	0
	5:56p STL	7:00p C	TW 557	FY	727		0
	4:45p	5:24p STL	TW 521	FY	72S	S	0
	6:30p STL	7:29p C	TW 493	FY	72S		0
X2	4:45p	5.24p STL	TW 521	FY	72S	S	0
	8:00p STL	8:45p C	OZ 521	Y	D9S		0
	4:45p	5:24p STL	TW 521	FY	72S	S	0
	8:50p STL	9:40p C	OZ 525	Yn	D9S		0
	5:45p	6:06p ORD	AL 209	Y	D9S	D	0
	7:03p ORD	8:23p C	TW 3	FYK	72S		0
	8:20p	8:41p ORD	UA 379	FnYnQ	D8S		0
	9:45p ORD	11:02p C	TW 743	FnYnK	L10		0
X6	9:25p	9:59p STL	TW 167	FnYn	72S		0
E-15 JUN	10:35p STL	11:25p C	TW 333	FnYn	707		0

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Source: South-western Publishing, Basic Skills for the Modern Offic

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WEEKLY TRAVEL EXPENSE REPORT

DEPARTURE	**RETURN**
HOUR ______ ☐ AM ☐ PM	HOUR ______ ☐ AM ☐ PM
PLACE HOME ☐ PLANT ☐	PLACE HOME ☐ PLANT ☐
(WHICHEVER IS LATER)	(WHICHEVER IS EARLIER)

NAME	BADGE NUMBER	DEPT. NO.	DATES FROM	TO

EXPENSE ITEMS DATE→	SATURDAY	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	TOTALS
1 ROOM								
2 MEALS & TIPS								
3 LAUNDRY								
4 TIPS								
5 SUB TOTAL OR PER DIEM								
6 RAILROAD								
7 AIRPLANE								
8 CAR OR BUS								
9 PERSONAL AUTO								
10 TAXI								
11 PARKING								
12 TOLLS								
13 TEL. & TELEGRAMS								
14								
15								
16								
TOTALS →							→	
MILEAGE								

FROM (INDICATE PLACE OF DEPARTURE)

TO (INDICATE DESTINATION)

PURPOSE OF TRIP

APPLICABLE CHARGE NO

ACCT. NO.

REC. ATTACHMENTS			
LODGING RECEIPT	☐	AMOUNT	FOR OFFICE USE ONLY
AIRLINE TICKETS	☐	DUE RAD	
RENTAL CAR INV.	☐	DUE EMPLOYEE	
PARKING-TOLL RECEIPT	☐	ADV. REDUCTION	
CONFERENCE RECEIPT	☐	DATE APPLIED	

REMARKS

RENTAL CAR MILEAGE BREAKDOWN

I CERTIFY THE ABOVE EXPENDITURES WERE MADE ON BEHALF OF REPUBLIC AVIATION DIVISION

DATE ____________

SIGNED ____________

DEPT. HEAD APPROVAL ____________

CHECKED BY ____________

TREASURY APPROVAL 338

Source: South-western Publishing, 1977, Secretarial Office Procedures Supplies Inventory

COMPETENCY AREA: ORGANIZATION/TIME MANAGEMENT

TASK: Maintain a desk calendar

PERFORMANCE OBJECTIVE:

Given a desk calendar and 10 items, the student will maintain a desk calendar by recording the items on the appropriate dates. All items should be recorded in an acceptable manner.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

DESK CALENDAR COMPETENCY TEST

Directions: Using the June calendar and the items listed below, decide how to handle the scheduling on the calendar. Mr. Martin Smythe, a lawyer, is the employer.

Mr. Rob Anderson needs to see Mr. Davis re: his father's estate (father: Edward C. Anderson)

Mr. Carter cannot keep his appointment on the 10th and would like one the following Wednesday

Toni Barrett called--return call asap

Meeting with Judge Johnson, 10 a.m., June 15. All appointments for the morning must be changed

Please do not schedule appointments for June 17

Plane leaves for New Orleans at 4:42 p.m., June 21

Mr. Smythe will return to the office at 11:30 a.m., June 25

Review Corrington complaint June 28

June 25--3:00--John Jones to discuss New Orleans convention

June 8--2:15 p.m., President of NOW, Mrs. Prestridge, discuss dinner meeting presentation

Y66F1C

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JUNE

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1 3:00 Wm Streiter Conference	2 10:00 Daisy Fields re: divorce 11:00 Timothy Mosler	3	4 10:00 Tom Maloof trial	5
6	7 10:00 ~~Douglas King~~ re: ~~litigation~~ cancel	8 Last day to file answer to Cordoba interrogatories	9 1:00 Ellen Murray re: litigation 7:00 NOW Dinner Meeting - Hilton	10 9:00 Henry Carter re: will Lunch with Rosa	11 9:00 Caleb Andreas re: Berghof v. Andreas 9:30 Luigi Brezzi briefing 1:00 Reston & Jordon re: conference	12
13	14 10 a.m. Florence Fitter re: Contract 11a.m. Rufus Jones re: affidavit 2p.m. Tom Maloof 6p.m. Optimist Club Dinner - Crown Room	15 9:00 H. McIntosh re: manuscript 10:30 Thomasina Orr re: divorce proc. 1:30 Wm. Streiter re: questions re. trial 1:00 M. Alvarez re: contract	16 1:00 Ted Ziegler re: litigation	17	18 12:00 Anita Haskins lunch	19
20	21	22 New Orleans - Convention - p.m.	23 New Orleans - Convention	24 New Orleans - Convention	25	26
27	28	29 Last day to file answer to Covington complaint	30			

MAY

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

JULY

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

COMPETENCY AREA: ORGANIZATION/TIME MANAGEMENT

TASK: Maintain a tickler file

PERFORMANCE OBJECTIVE:

Given 10 invoices and numbered file guides, the student will maintain a tickler file by establishing a file and filing the invoices by due date. At least 8 of the 10 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

MAINTAIN TICKLER FILE COMPETENCY TEST

Directions: Using numbered file guides and the following invoices, compute the invoice due date and file the invoices by the due date.

Obtain a file guide from your teacher.

steelcase office furniture

988 West 14th Street, Long Beach, CA 90801

INVOICE

SOLD TO MOUNTAIN VIEW OFFICE SUPPLIES, INC.
1135 RIALTO AVENUE
SAN BERNARDINO, CA 92304

Invoice No. 384-456
Date JULY 2, 19--
Customer's Order No. 5375-8

Terms 3/10 NET 30

Shipped Via BEST WAY

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
1	TF-2124C STANDARD ROLLAWAY FILE UNIT	52	00	52	00
1	TF-2424C DELUXE ROLLAWAY FILE UNIT	96	00	96	00
2	ME-58B SENTRY SAFE	168	95	337	90
				485	90
	LESS 40%			194	36
				291	54

Goforth & Marti

12738 main street, los angeles, ca 90052

INVOICE

SOLD TO MOUNTAIN VIEW OFFICE SUPPLIES, INC.
1135 RIALTO AVENUE
SAN BERNARDINO, CA 92304

Invoice No. 1972
Date 7/2/19--
Customer's Order No. 5373-8

Terms 2/10 NET 30

Shipped Via BEST WAY

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
144	82-83-281 CANVAS STIFF COVER BINDERS	1	17	168	48
20 BOXES	C3-78C11-C E-Z SLIDE REPORT COVERS	12	50	250	00
10 DOZEN	Z2-202 CLIPBOARDS	10.90/DOZ		109	00
12	Y7-8 DICTIONARIES	6	95	83	40
				610	68
	LESS 50%			305	44
				305	44

H.
C. Whittaker Corporation
I. 5393 Maridian Avenue, Indianapolis, IN 46224

INVOICE

SOLD TO MOUNTAIN VIEW OFFICE SUPPLIES, INC.
1135 RIALTO AVENUE
SAN BERNARDINO, CA 92304

Invoice No. 8691-PO
Date JUNE 24, 19—
Customer's Order No. 3417-B

Terms 2/10 NET 30
Shipped Via BEST WAY

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
12	BE-1108F Bela steel folding chairs	20	25	243	00
25	BE-504S Upholstered steel chairs	25	45	636	25
3	PT-VSP-6 Single post floor rack	42	00	126	00
				1005	25
	LESS 40%			402	10
				603	15

Blake, Moffit, and Towne Paper
1546 West 16th Street, Tuscon, AZ 85700

INVOICE

SOLD TO MOUNTAIN VIEW OFFICE SUPPLIES, INC.
1135 RIALTO AVENUE
SAN BERNARDINO, CA 92304

Invoice No. 8700
Date JUNE 29, 19--
Customer's Order No. 535A-B

Terms 2/10 NET 30
Shipped Via BEST WAY

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
12 CASES	G3-115-31 FILE GUIDES	5	20	62	40
100 REAMS	L3-790-0 MANIFOLD SECOND SHEETS	2	95	295	00
144 BOXES	X-11-2702 BOXED ENVELOPES	5.88/	12	70	56
50 REAMS	L3-980 IMPRINTED MANIFOLD SECOND SHEETS	3	35	167	50
				595	46
	LESS 30% DISCOUNT			178	64
	NET			417	17

Neste, Brudin, & Stone, Inc

16809 Holly Drive
San Antonio, TX 78205

INVOICE

SOLD TO Mountain View Office Supplies, Inc.
1135 Rialto Avenue
San Bernardino, CA 92304

Invoice No. 1137
Date June 26, 19 --
Customer's Order No. 3421-B

Terms 2/10 Net 30

Shipped Via Parcel Post

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
6	VPK-445-10F Parker 51 fountain pens	12	50	75	00
144	VER-59-DKBL Retractable pens		59	84	96
144	UW-AF49 Ballpoint pens (fine)		49	70	56
6	U-8-KP8A Electric pencil sharpeners	19	95	119	70
				350	22
	Less 50%			175	11
				175	11

KILGORE INDUSTRIES

519 West Second Street, San Francisco, CA 94101

INVOICE

SOLD TO Mountain View Office Supplies, Inc.
1135 Rialto Avenue
San Bernardino, CA 92304

Invoice No. 561
Date June 28, 19--
Customer's Order No. 5359-B

Terms 1/10 Net 30

Shipped Via Best Way

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
6	BK-ML-568 Folding utility tables	96	20	577	20
4	UC-W320A Arm chairs	58	00	232	00
				809	20
	Less 40%			323	68
	Net			485	52

S.S. White Company
704 Grass Valley Road
New Orleans, LA 70113

INVOICE

SOLD TO Mountain View Office Supplies, Inc.
1135 Rialto Avenue
San Bernardino, CA 92304

Invoice No. CA-00981
Date June 25, 19--
Customer's Order No. 3419-B

Terms 1/10 Net 30

Shipped Via Best Way

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
6	29-655 Wall urns	32	60	195	60
	Less 45%			88	02
				107	58

J. R. Freeman Company

24506 North "D" Street
Denver, CO 80202

INVOICE

SOLD TO Mountain View Office Supplies, Inc.
1135 Rialto Avenue
San Bernardino, CA 92304

Invoice No. AB-4440
Date June 29, 19--
Customer's Order No. 5368-B

Terms 2/10 Net 30

Shipped Via Best Way

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
144	05-515 Standard typewriter pads	3	25	468	00
144	05-1416 Electric typewriter pads	5	75	828	00
				1296	00
	Less 50%			648	00
				648	00

Stationers Corporation
580 South "H" Street
Oklahoma City, OK 73125

INVOICE

SOLD TO MOUNTAIN VIEW OFFICE SUPPLIES, INC.
1135 RIALTO AVENUE
SAN BERNARDINO, CA 92304

Invoice No. 00900
Date 6/27-19--
Customer's Order No. 5369-B

Terms 2/10 NET 30

Shipped Via BEST WAY

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
10 CASES	A10-14113-1 ONE-PART COMPUTER PAPER	18	40	184	00
10 CASES	A10-14113-2 TWO-PART COMPUTER PAPER	20	21	202	10
10 CASES	A10-14113-3 THREE-PART COMPUTER PAPER	22	97	229	70
				615	80
	LESS 35%			215	53
				400	27

ALLSTATE

443 West Eighth Street
St. Louis, MO 63155

Building Maintenance Co.

INVOICE
Routine

SOLD TO MOUNTAIN VIEW OFFICE SUPPLIES, INC.
1135 RIALTO AVENUE
SAN BERNARDINO, CA 92304

Invoice No. 436
Date JUNE 26, 19--
Customer's Order No. 5344-B

Terms 1/10 NET 30

Shipped Via BEST WAY

QUANTITY	DESCRIPTION	UNIT PRICE		TOTAL AMOUNT	
6	V2-995 TOWEL CABINETS	7	25	43	50
	LESS 30%			13	05
	NET			30	45

COMPETENCY AREA: ORGANIZATION/TIME MANAGEMENT SKILLS

TASK: Record merchandise or stock inventory

PERFORMANCE OBJECTIVE:

Given source documents, the student will record a stock inventory using a prepared computer program with 30 of the 40 entered correctly.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST:

Using the given inventory tickets, the student will record a stock inventory using a prepared computer inventory program of the teacher's choice.

Source of inventory tickets: South-western, Microcomputer Activities for Office Procedures, 1984.

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5905	226	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6053		550

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
2326		74

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5604	318	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6243		53

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6098	48	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5713		23

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
1425	15	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
1425		9

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6040		7

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5847	13	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
2326	143	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5902	197	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6057	120	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
2327	84	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6194	12	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5894	17	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6057		98

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5712		29

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6059		114

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6097	24	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5905		185

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5901		170

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6040	0	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
2327		96

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6053	626	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5713	17	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5902		214

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6243	48	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5604		170

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5894		14

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.

Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6215		42

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.
Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5901	239	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.
Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6059	97	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.
Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6097		27

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.
Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5712	43	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.
Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6215	35	

Date 6-30 Stock Taker CB

Khazala Specialties, Inc.
Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6098		52

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.
Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
6194		31

Date 6-30 Stock Taker SN

Khazala Specialties, Inc.
Inventory Ticket

Stock No.	Quantity W/H #1	Quantity W/H #2
5847		43

Date 6-30 Stock Taker SN

RECORDING, FILING, RECORDS MANAGEMENT

TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
* 1. Index, code, sort, and file alphabetically.	Required	20	80	23	82	15	63	5	83	13	87
	Desired	5	20	5	18	7	29	1	17	2	13
	Unnecessary	0	0	0	0	2	8	0	0	0	0
* 2. Code, sort, and file numerically.	Required	18	72	23	82	15	63	5	83	11	73
	Desired	5	20	5	18	7	29	1	17	2	13
	Unnecessary	2	8	1	4	2	8	0	0	2	13
* 3. Retrieve material from the file; complete an out card and record.	Required	18	72	20	71	9	38	5	83	7	47
	Desired	5	20	5	18	10	42	1	17	4	27
	Unnecessary	2	8	3	11	5	20	0	0	4	27

* Objective and test are completed for this task.

COMPETENCY AREA: RECORDING, FILING, RECORDS MANAGEMENT

TASK: Index, code, sort, and file alphabetically and chronologically (name and date)

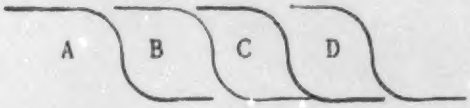
PERFORMANCE OBJECTIVE:

Given 15 pieces of correspondence, a file (or simulated file) with guides and folders set up for alphabetic filing, and written instructions to apply the alphabetic filing system, the student will index, code, sort, and file the correspondence alphabetically and chronologically (by date where necessary). Thirteen out of the 15 pieces of correspondence must be filed correctly.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

*Note: If filing materials are provided for the student, the teacher would need to make up individual letterhead for each of the names on the following page. A 3 x 5 card filing system would work for this type of test.

Example of file system needed



ALPHABETICAL AND CHRONOLOGICAL FILING TEST

Directions: Index, code, sort, and file the following pieces of correspondence alphabetically and chronologically (where necessary). In the blanks, put the number of the order in which the item would appear in the file. Thirteen out of the 15 pieces must be filed correctly.

1. Reverend Andy Cale, May 31, 1983
2. ACD Tools, Inc., January 1, 1983
3. Boston Office Supplies, May 5, 1983
4. George M. Denny, March 3, 1983
5. Calendar's Unlimited, February 25, 1983
6. Acme Tool Company, June 28, 1982
7. Coles' Cleaners, March 30, 1983
8. George M. Denney, March 4, 1983
9. Cole's Groceries, March 31, 1983
10. Terry D. Cole, September 10, 1982
11. Dr. James Duley, August 20, 1982
12. ACD Tools, Inc., April 4, 1982
13. Dr. James Duley, August 12, 1983
14. Brighton-Stone Bakery, July 11, 1983
15. JoAnn Brighton-Stone, July 15, 1983

COMPETENCY AREA: RECORDING, FILING, RECORDS MANAGEMENT

TASK: Code, sort, and file numerically

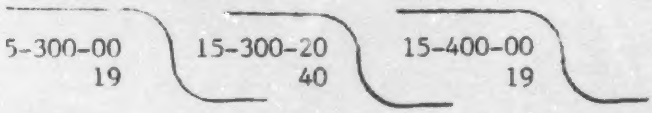
PERFORMANCE OBJECTIVE:

Given 15 accounts (or account numbers), a filing system with the guides set up for numeric filing, and written instructions to apply the numeric filing system, the student will code, sort, and file the accounts (account numbers) numerically. Thirteen out of the 15 pieces must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

*Note: If filing materials are provided for the student, the teacher would need to make up individual account cards for each of the account numbers. A 3 x 5 card filing system would work for this type of test.

Example of filing system needed



FILING NUMERICALLY COMPETENCY TEST

Directions: File the following accounts numerically. In the blank, write the number of the order in which the item would appear in a file. Thirteen out of the 15 pieces must be correct.

1. 15-400-12
2. 15-300-01
3. 15-300-21
4. 15-400-02
5. 15-400-17
6. 15-300-39
7. 15-300-20
8. 15-300-15
9. 15-400-05
10. 15-400-18
11. 15-300-23
12. 15-300-19
13. 15-300-10
14. 15-300-07
15. 15-400-15

BEST COPY AVAILABLE

COMPETENCY AREA: RECORDING, FILING, RECORDS MANAGEMENT

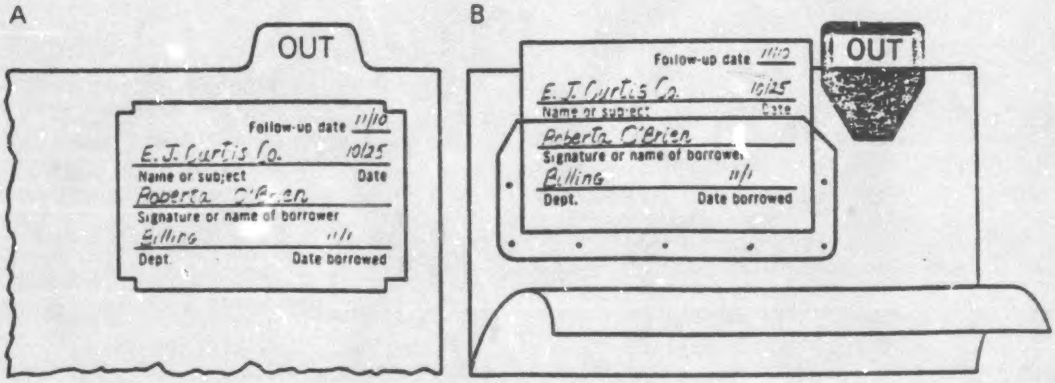
TASK: Retrieve materials from the file; complete an out card and checkout record

PERFORMANCE OBJECTIVE:

Given a list of five pieces of correspondence previously filed, the student must retrieve materials from the file, complete an out card to put in place of the retrieved correspondence, and fill in the necessary information on a checkout record. Four out of the five pieces must be retrieved, the out card properly filled out and in correct position, and properly checked out on the check out record correctly.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

Example of out cards and checkout record


A
OUT
Follow-up date 11/10
E. J. Curtis Co.
10/25
Name or subject
Date
Roberta O'Brien
Signature or name of borrower
Billing
11/1
Dept.
Date borrowed
B
OUT
Follow-up date 11/10
E. J. Curtis Co.
10/25
Name or subject
Date
Roberta O'Brien
Signature or name of borrower
Billing
11/1
Dept.
Date borrowed

(A) An out guide and (B) an out folder.

CHECK OUT RECORD

Name of Correspondence	Date of Correspondence	Borrowers Initials	Date Borrowed	Date Returned

RETRIEVING MATERIALS COMPETENCY TEST

Directions: Use the correspondence filing system in which you have filed 15 pieces of correspondence. Retrieve all requested correspondence, fill out the out card, and checkout record. Four out of the five must be correct. All work must be judged acceptable by the instructor.

1. Brighten-Stone Bakery, July 11, 1983
2. ACD Tools, Inc., April 4, 1982
3. George M. Denney
4. Dr. James Duley, August 12, 1983
5. Calendar's Unlimited, February 25, 1983

COMPETENCY AREA: RECORDING, FILING, RECORDS MANAGEMENT

TASK: Define filing procedures and filing supplies

PERFORMANCE OBJECTIVE:

Given a list of terms of filing procedures (indexing, coding, sorting, filing, cross-referencing, retrieving, release marking, inspecting, dating) and eight definitions of the use of these procedures, the students will identify the correct definitions of these terms by matching at least six out of the eight terms with the correct definitions.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

FILING PROCEDURES COMPETENCY TEST

Directions: Identify the correct definition of the listed supplies and place the correct number in the blank provided. Six out of the eight terms must be correct.

1. ____ Indexing
2. ____ Coding
3. ____ Sorting
4. ____ Filing
5. ____ Cross-referencing
6. ____ Retrieving
7. ____ Release marking-Inspecting
8. ____ Dating

a. A particular mark on a piece of correspondence indicating it is ready to be filed

b. Underscoring the most likely name under which a piece of correspondence is to be filed

c. The order in which pieces of correspondence are found in the file

d. The pulling of a piece of correspondence from the file

e. Where pieces of correspondence are placed for storage

f. The stamping of the date on correspondence the day it is received

g. When a piece of correspondence can be filed in two different places

h. Putting pieces of correspondence in order so that it may be filed quickly

KEY TO TEST ON PAGE 8

1. c
2. b
3. h
4. 3
5. g
6. d
7. a
8. f

COMPETENCY AREA: RECORDING, FILING, RECORDS MANAGEMENT

TASK: Identify types of filing supplies

PERFORMANCE OBJECTIVE:

Given a list of terms of filing supplies (file folders, guides, file folder labels, out cards, requisition slips, cross-reference cards), the student will identify the types of filing supplies by matching the supply with its definition. Four of the six must be matched correctly.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

FILING SUPPLIES COMPETENCY TEST

Directions: Identify the correct definition of the listed supplies and place the correct letter in the blank provided. Four out of five must be correct.

1. ____ File folders
2. ____ Guides
3. ____ File folder labels
4. ____ Out cards
5. ____ Requisition slips
6. ____ Cross-reference cards

a. Put in place of a retrieved piece of correspondence

b. Where correspondence is placed

c. Used when a piece of correspondence can be filed in two different places

d. Dividers used to separate file folders into various areas in the file cabinet

e. The name on the file which indicates what is in the file

f. A request to pull a particular piece of correspondence

KEY TO TEST ON PAGE 11

1. b
2. d
3. e
4. a
5. f
6. c

COMPETENCY AREA: RECORDING, FILING, RECORDS MANAGEMENT

TASK: Identify types of filing equipment

PERFORMANCE OBJECTIVE:

Given a list of 17 pieces of filing equipment and the following types of equipment: manual equipment, mechanized filing equipment, word processing equipment, electronic data processing equipment, and micrographics equipment, the student will identify the types of filing equipment by classifying the pieces of equipment into the category into which it belongs. At least 13 of the 15 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

FILING EQUIPMENT COMPETENCY TEST

Directions: Place the items listed at the bottom of this page into the correct column of equipment. Thirteen of the 17 must be correct.

Manual Equipment	Mechanized Filing	Word Processing Equipment	Electronic Data Processing Equipment	Micrographics Equipment

Vertical Cabinets
Open Shelf Files
Power Driven
Reader-Viewer
Reader-Printer
Electronic
Electronic Systems
Lateral Cabinets
Storage Mediums
Cameras
Storage Files
Vertical Card File
Processing Machines
Mobile Files
Rotary Files
Microforms
Hanging Folder

*Note: One of the items in the above list may be placed under two types of equipment.

KEY TO TEST ON PAGE 14

MANUAL EQUIPMENT

Vertical Cabinets
Lateral Cabinets
Vertical Card Files
Hanging Folder Equipment

Open Shelf Files
Rotary Files
Mobile Files

MECHANIZED FILES

Electronic

Power Driven

WORD PROCESSING EQUIPMENT

Processing Machines

Storage Mediums

ELECTRONIC DATA PROCESSING EQUIPMENT

Electronic Systems

Storage Mediums

MICROGRAPHICS EQUIPMENT

Cameras
Reader-Viewer

Microforms
Reader-Printer

TELEPHONE SKILLS

TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
* 1. Identify telephone services and types of call.	Required	16	64	19	68	13	57	1	17	12	80
	Desired	8	32	4	14	6	26	2	33	3	20
	Unnecessary	1	4	5	18	4	17	3	50	0	0
* 2. Locate telephone numbers.	Required	19	76	21	75	13	57	1	17	12	80
	Desired	5	20	5	18	9	39	4	67	3	20
	Unnecessary	1	4	2	7	1	4	1	17	0	0
* 3. Answer telephone and take accurate messages including verifying number and name.	Required	23	92	24	86	18	78	2	33	15	100
	Desired	2	8	4	14	3	13	3	50	0	0
	Unnecessary	0	0	0	0	2	9	1	17	0	0
* 4. Place telephone calls, demonstrating follow through until right person is contacted.	Required	21	84	21	75	15	65	0	0	12	80
	Desired	2	8	5	18	7	31	4	67	2	13
	Unnecessary	2	8	2	7	1	4	2	33	1	7

* Objective and test are completed for this task.

COMPETENCY AREA: TELEPHONE

TASK: Identify telephone services and types of calls

PERFORMANCE OBJECTIVE:

Given a list of 20 telephone terms and a description of 20 services and calls, the student will identify the telephone services and types of calls by matching the terms with their descriptions. At least 16 of the 20 items must be matched correctly.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

TELEPHONE SERVICES COMPETENCY TEST

Directions: Match the following telephone terms to the type of services and calls.

TERMS

a. Area Code
b. Business White Pages Directory
c. Call Forwarding
d. Collect Call
e. Community Service Number
f. Conference Call
g. Credit Card Call
h. Directory Assistance
i. Direct Dialing
j. 800 Number Call
k. International Call
l. 1-411
m. 1-555-1212
n. 1-Area Code-555-1212
o. 1-800-555-1212
p. Operator Assistance
q. Person to Person Call
r. Three Way Call
s. Wide Telephone Service
t. Yellow Pages Directory

SERVICE OR CALL

Add a third person to your conversation during a local or a long distance call 1. ____

Forward incoming calls automatically to another phone while you are away from your desk 2. ____

Locate and obtain a local phone number 3. ____

Locate and obtain an out-of-state phone number 4. ____

Locate and obtain a phone number out of the local area within the state 5. ____

Locate and obtain a phone number of a business that has a WATS service number 6. ____

Acquiring an unknown number concerning one of your clients 7. ____

A section in the phone book to locate a business phone number 8. ____

A section in the phone book to locate a business service advertisement and phone number 9. ____

Dialing your own long distance calls 10. ____

Calling long distance while out of town and charging it to your phone bill 11. ____

Calling a firm that will accept the charges 12. ____

Calling a specific person and this is the most expensive type of call 13. ____

Talking on the phone to several people in different places at the same time 14. ____

Calling a phone number overseas 15. ____

Calling a business that has an 800 number 16. ____

Reaching a specific state by using this number 17. ____

Locating phone number to make arrangements for your employer's passport 18. ____

Making a phone call on a toll free number 19. ____

Acquiring information by calling the following numbers: (1-411) (1-555-1212) (1-Area Code-555-1212) (1-800-555-1212) 20. ____

COMPETENCY AREA: TELEPHONE

TASK: Locate telephone numbers

PERFORMANCE OBJECTIVE:

Given a telephone directory and a list of 25 names, of which some names will be government agencies and some names will sound alike but will be spelled differently, the student will locate in the directory each name on the list and record the correct telephone number in the space provided. At least 20 of the 25 phone number must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

LOCATE TELEPHONE NUMBERS COMPETENCY TEST*

Directions: Locate and write down telephone numbers for the following from your local telephone directory.

1. Clerk of County Court
2. W. Smith
3. John M. Zbyszinski
4. Jerry Messick
5. the local ready-mix plant
6. Auto Registration--State of Wyoming
7. Civil Defense--Emergency
8. Lloyd Johnson
9. Capitol Health Foods
10. legal office of J. K. Rutledge
11. Mel's Auction
12. Moore, Gary L.
13. Donald D. Schumacher
14. Merle Andersen
15. L. O. Johnson
16. Daniel Curtright
17. Dennis Hodgdon
18. State Brand Inspector
19. Montgomery Ward--catalog sales
20. Fiddler's Roost in Pine Bluffs
21. Mountain Bell--resident repair service
22. Expert Tree Service
23. 800 Directory Assistance
24. Chief of Police
25. high school ag shop

*Note: This is a sample test made from the Cheyenne Area 1983 Telephone Book. Be sure tht your test applies to the telephone book available in your classroom

COMPETENCY AREA: TELEPHONE

TASK: Answer telephone and take accurate messages

PERFORMANCE OBJECTIVE:

Given a role-playing situation, the student will answer the telephone and take accurate messages. A checklist will be used to evaluate performance. Five out of five must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

ANSWER AND TAKE ACCURATE TELEPHONE MESSAGES COMPETENCY TEST

Directions: Take appropriate action in the following situation. With the teacher acting as the caller, the student will be receiving the call. The caller will not give their name or firm name. Your employer is gone for the afternoon and is on the golf course (which he does not want anyone to know). Caller finally identifies themself and leaves the following information. Use current date and time. Return call asap regarding tomorrow's luncheon. (Teacher should supply name and local firm and complete telephone number.)

The evaluation checklist is printed on the next page.

ANSWER TELEPHONE CHECKLIST

	ACCEPTABLE	UNACCEPTABLE
1. Voice, Speech, Vocabulary pleasant voice clear and careful speech moderate rate of speech state ideas simply	________	________
2. Courtesy give phone call all your attention listen quietly don't allow person to wait over one minute for information	________	________
3. Answering call answer promptly give firm or office name give student's name	________	________
4. Giving Information/Taking Message discriminate about information given out message must contain: exact time of call, date name/firm of caller complete phone number of caller details of message student's initials	________	________
5. Terminating Call friendly, unhurried thank caller goodbye	________	________

COMPETENCY AREA: TELEPHONE

TASK: Place telephone calls, demonstrating follow through until right person is contacted

PERFORMANCE OBJECTIVE:

Given a role-playing situation, the student will place a telephone call and demonstrate follow through until the right person is contacted. A checklist will be used to evaluate performance. All items must be acceptable

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

PLACE TELEPHONE CALLS COMPETENCY TEST

Directions: You are to call the Casper Holiday Inn and make reservations for your boss and yourself for the nights of October 24, 25 of the current year. You will need two rooms and you will need a conference room for 2 p.m. on the 24th large enough for 20 people. You will be put on hold at least once. The teacher will take part in this role playing situation.

The evaluation checklist is on the following page.

PLACING TELEPHONE CALLS CHECKLIST

	ACCEPTABLE	UNACCEPTABLE
1. Locate phone number		
2. Speech, Vocabulary, Voice, Courtesy		
3. Relay complete information to correct person		
4. Exhibit patience if put on hold		
5. Termination of call		

TYPING SKILLS

TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
* 1. Demonstrate correct typing skills.	Required	20	80	21	75	11	46	3	50	11	73
	Desired	4	16	6	21	10	42	3	50	4	27
	Unnecessary	1	4	1	4	3	12	0	0	0	0
* 2. Identify operative parts of a typewriter and their operations.	Required	14	56	8	29	8	33	2	33	4	27
	Desired	7	28	10	36	6	25	2	33	8	53
	Unnecessary	4	16	10	36	10	42	2	33	3	20
* 3. Demonstrate speed and accuracy in typing straight copy.	Required	20	80	16	57	10	42	4	67	9	60
	Desired	3	12	10	36	6	25	1	17	5	33
	Unnecessary	2	8	2	7	8	33	1	17	1	7
* 4. Type and correct business letters and envelopes.	Required	21	84	21	75	8	33	2	33	10	67
	Desired	3	12	6	21	11	46	3	50	4	27
	Unnecessary	1	4	1	4	5	21	1	17	1	6
* 5. Type interoffice memoranda.	Required	19	76	12	43	7	29	2	33	7	47
	Desired	5	20	11	39	8	33	4	67	3	20
	Unnecessary	1	4	5	18	9	38	0	0	5	33
* 6. Type and correct tabulated information.	Required	19	76	12	43	8	33	3	50	10	67
	Desired	5	20	13	46	7	29	3	50	3	20
	Unnecessary	1	4	3	11	9	38	0	0	2	13
7. Chain feed, type, and correct address on envelopes.	Required	10	40	10	36	2	8	1	17	3	21
	Desired	6	24	10	36	8	33	2	33	5	36
	Unnecessary	9	36	8	28	14	58	3	50	6	43
* 8. Demonstrate problem solving and creativity in establishing headings, charts, boxed information, capitalization and italics, etc. from copy.	Required	15	60	8	31	6	25	3	50	7	47
	Desired	7	28	11	42	7	29	2	33	4	27
	Unnecessary	3	12	7	27	11	46	1	17	4	27
* 9. Demonstrate proficiency in typing numbers.	Required	17	68	16	57	10	42	4	67	11	73
	Desired	6	24	10	36	9	38	2	33	4	27
	Unnecessary	2	8	2	7	5	20	0	0	0	0
* 10. Demonstrate proofreading skills.	Required	21	84	17	61	9	38	4	67	12	80
	Desired	4	16	11	39	8	33	2	33	3	20
	Unnecessary	0	0	0	0	7	24	0	0	0	0

* Objective and test are written for this task.

COMPETENCY AREA: TYPING

TASK: Demonstrate Correct Typing Techniques

PERFORMANCE OBJECTIVE:

Given straight copy material from which to type, the student will demonstrate correct typing techniques. A checklist will be used for evaluation. The student will be evaluated 3 times during the first grading period. All items must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: Two checklists are provided. The choices will allow the teacher to use the one they prefer and time allows.

TYPING TECHNIQUES CHECKLIST

	Acceptable	Unacceptable
Hand Position	________	________
Eye Direction	________	________
Posture	________	________
Work Habits	________	________

DETAILED TYPING TECHNIQUES CHECKLIST

	Acceptable	Unacceptable
Hand Position: Fingers curved Wrists low and off machine Forearm par to keyboard	________	________
Eye Direction: Eye on copy	________	________
Posture: Sits up straight Feet apart and flat on floor	________	________
Work Habits: Follows directions Alert and not tense Makes effort to reach goals Proper fingering	________	________

COMPETENCY AREA: TYPING

TASK: Identify operative parts of a typewriter and their operations

PERFORMANCE OBJECTIVE:

Given a diagram of a typewriter with 28 specific parts marked with letters and a list of the parts, the student will identify the operative parts of a typewriter and their operations by matching the lettered parts of the diagram from the list of parts. At least 21 of the 28 must be correct.

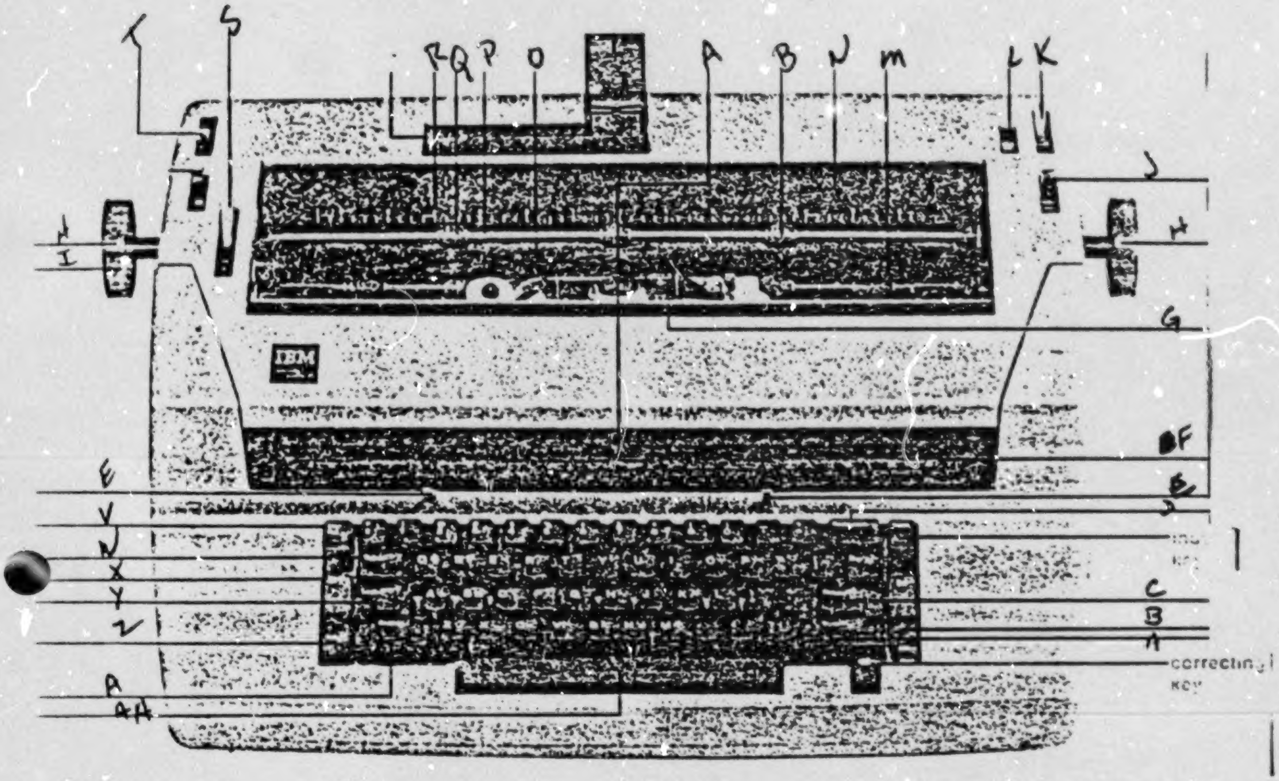
SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: Evaluations are provided for a manual and an electric typewriter.

ELECTRIC TYPEWRITER TEST

MATCHING

Match the typewriter part list to the letters indicated on the elctric typewriter.



ANSWER

1. ____ 15.
2. ____ 16.
3. ____ 17.
4. ____ 18.
5. ____ 19.
6. ____ 20.
7. ____ 21.
8. ____ 22.
9. ____ 3.
10. ____ 24.
11. ____ 25.
12. ____ 26.
13. ____ 27.
14. ____ 28.

Electric typewriter parts:

1. Aligning Scale
2. Automatic Line Finder
3. Backspace Key
4. Card/envelope Holder
5. Element
6. Carriage Release (L.& R.)
7. Carrier Return Key
8. Line-space Selector
9. Margin Scale
10. Margin Release
11. Margin Stops (L.& R.)
12. On/Off Control
13. Paper Bail
14. Paper Bail Rolls
15. Paper Guide
16. Paper Guide Scale
17. Paper Release Lever
18. Paper Table
19. Platen
20. Platen Knobs (L.& R.)
21. Printing Point Indic
22. Space Bar
23. Shift Keys
24. Shift Lock
25. Tabulator
26. Tab Clear
27. Tab Set
28. Variable Line Spacer

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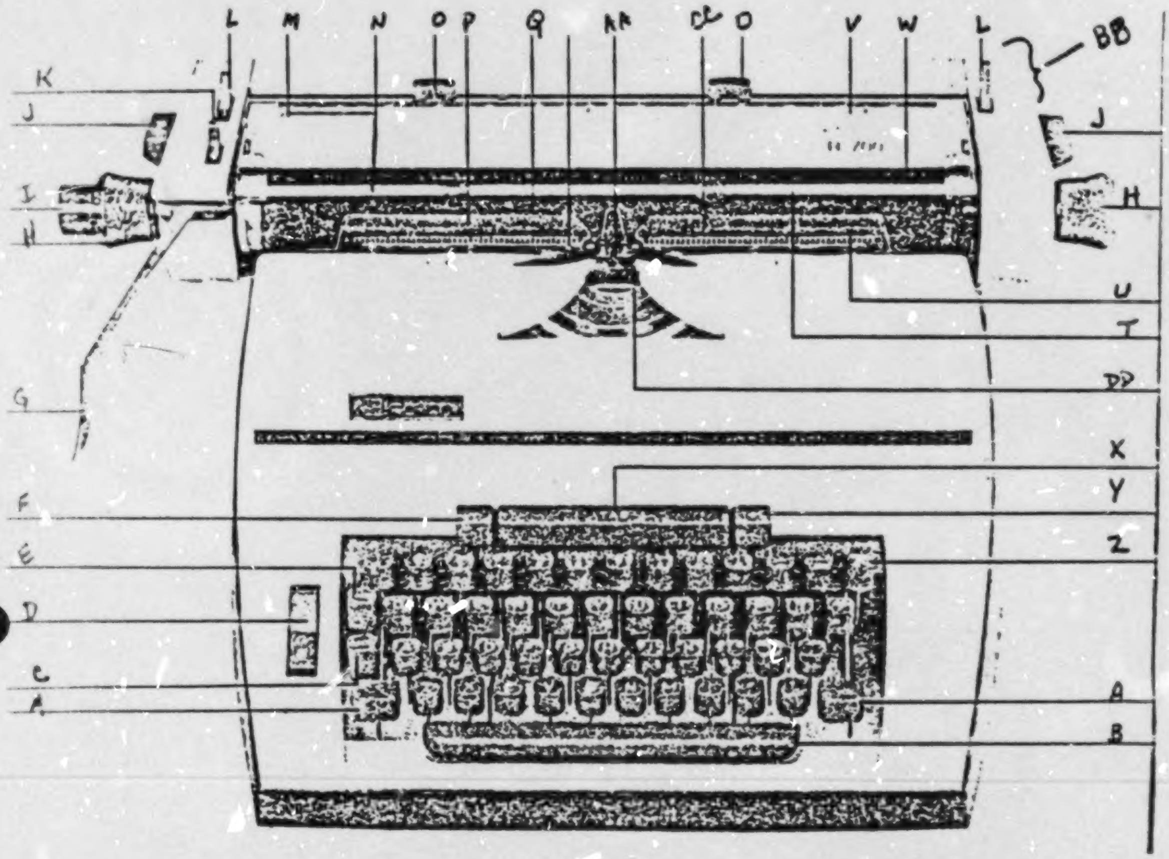
MANUAL TYPEWRITER TEST

MATCHING

Match the typewriter part list to the letters indicated on the manual typewriter.



ANSWER

1. ____ 15. _
2. ____ 16. _
3. ____ 17. _
4. ____ 18. _
5. ____ 19. _
6. ____ 20. _
7. ____ 21. _
8. ____ 22. _
9. ____ 2
10. ____ 24. _
11. ____ 25. _
12. ____ 26. _
13. ____ 27. _
14. ____ 28. _

Manual typewriter parts:

1. Aligning Scale
2. Automatic Line Finder
3. Backspace Key
4. Card/envelope Holder
5. Carriage
6. Carriage Release (L.& R.)
7. Carriage Return Lever
8. Line-space Selector
9. Margin Scale
10. Margin Release
11. Margin Stops (L.& R.)
12. Paper Bail
13. Paper Bail Rolls
14. Paper Guide
15. Paper Guide Scale
16. Paper Release Lever
17. Paper Table
18. Platen
19. Platen Knobs (L. & R.)
20. Printing Point Indicator
21. Space Bar
22. Shift Keys
23. Shift Lock
24. Tabulator
25. Tab Clear
26. Tab Set
27. Variable Line S
28. Ribbon Control

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COMPETENCY AREA: TYPING

TASK: Identify principles of typewriting

PERFORMANCE OBJECTIVE:

Given a 30-item completion test on the principles of typewriting (spacing and measurements), the student will identify the principles of typewriting by completing the question with the correct answer. Twenty-one of the 30 principles must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

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PRINCIPLES OF TYPEWRITING COMPETENCY TEST

Directions: Complete each statement by writing your answer in the answer column to the right.

There are ____ horizontal spaces to an inch on an ELITE typewriter. 1. __________

There are ___ horizontal spaces to an inch on a PICA typewriter. 2. __________

There are ____ vertical lines to an inch on ELITE and PICA typewriters. 3. __________

A standard sheet of typing paper is ___ inches wide. 4. __________

A standard sheet of typing paper is ___ inches long. 5. __________

There are ___ horizontal elite spaces on a standard sheet of typing paper. 6. __________

There are ____ horizontal pica spaces on a standard sheet of typing paper. 7. __________

There are ___ vertical lines for elite or pica on a standard sheet of typing paper. 8. __________

There are ____ spaces in a paragraph indention for business letters and manuscripts. 9. __________

10. __________

The elite center point of a standard sheet of typing paper is ___.

The pica center point of a standard sheet of typing paper is ___. 11. __________

The left and right margin stops for elite type for a: 12.

a) 50 space line
b) 60 space line
c) 80 space line

a)L:___ R:___
b)L:___ R:___
c)L:___ R:___

The left and right margin stops for pica type for a: 13.

a) 50 space line
b) 60 space line
c) 80 space line

a)L:___ R:___
b)L:___ R:___
c)L:___ R:___

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The left and right margin stops for elite type for: 14. ________

a) one inch margins on a standard sheet of typing paper a)L:___ R:___
b) one and one-half inch margins on a standard sheet of typing paper b)L:___ R:___
c) two inch margins on a standard sheet of typing paper c)L:___ R:___

The left and right margin stops on pica type for: 15.

a) one inch margins on a standard sheet of typing paper a)L:___ R:___
b) one and one-half inch margins on standard typing paper b)L:___ R:___
c) two inch margins on standard typing paper c)L:___ R:___

There are ___ horizontal elite spaces on a full sheet of standard typing paper inserted LONG SIDE UP. 16. ________

There are ___ horizontal pica spaces on a full sheet of standard typing paper inserted LONG SIDE UP. 17. ________

There are ___ horizontal elite spaces on a half sheet of standard typing paper inserted LONG SIDE UP. 18. ________

There are ___ horizontal pica spaces on a half sheet of standard typing paper inserted LONG SIDE UP. 19. ________

There are ___ vertical line spaces on a full sheet of standard typing paper inserted LONG SIDE UP. 20. ________

There are ___ vertical line spaces on a half sheet of standard typing paper inserted LONG SIDE UP. 21. ________

There are ___ vertical line spaces on a half sheet of standard typing paper inserted SHORT SIDE UP. 22. ________

There are ___ horizontal pica spaces on a half sheet of standard typing paper inserted SHORT SIDE UP. 23. ________

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There are ___ horizontal elite spaces on a half sheet of standard typing paper inserted SHORT SIDE UP. 24. __________

There are ___ horizontal line spaces on a full sheet of standard typing paper inserted SHORT SIDE UP. 25. __________

There are ___ spaces after a punctuation at the end of a sentence. 26. __________

There are ___ spaces after a comma or a semicolon. 27. __________

There are ___ spaces after a period in an initial or abbreviation and title. 28. __________

29. __________

There are ___ spaces after a colon except when it is used to express time.

There are ___ spaces after a period with degrees or with letters in a group. 30. __________

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COMPETENCY AREA: TYPING

TASK: Demonstrate speed and accuracy in typing straight copy

PERFORMANCE OBJECTIVE:

Given a 5-minute timed writing from straight copy, the student will demonstrate speed and accuracy by typing at least 40 gwam with no more than 5 errors. A checklist will be used to evaluate performance.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: The teacher is to select a 5-minute timed writing. It is recommended that at least two timings be given in one setting and that the syllabic intensity (SI) be approximately the same if two different timed writings are used.

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TYPING STRAIGHT COPY CHECKLIST

	Acceptable	Unacceptable
1. 40 or more gwam	________	________
2. 5 or less errors	________	________

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COMPETENCY AREA: TYPING

TASK: Type and correct business letters and envelopes

PERFORMANCE OBJECTIVE:

Given a rough draft of a letter, the student will type correctly a business letter and envelope. A checklist will be used to evaluate performance. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: The following guidelines are suggested for determining acceptability:

ACCEPTABLE

1. Placement that is not obviously (to a layman) imperfect
2. Optional letter part omitted (company name, subject line, etc)
3. Unimportant letter parts in the wrong order (enclosure notation before reference initials)
4. Incorrect punctuation mark that DOES NOT CHANGE THE MEANING of the sentence
5. Incorrect paragraphing as long as student doesn't fail to paragraph a whole letter or whole section

UNACCEPTABLE

1. Poor placement
2. Typographical error
3. Obvious correction
4. Correction of more than 10 letters in a row
5. Omitted necessary punctuation
6. Incorrect word division
7. Envelope address obviously misplaced

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BUSINESS LETTER ACCEPTABILITY CHECKLIST

	Acceptable	Unacceptable
1. Placement	________	________
2. Corrections	________	________
3. Spelling	________	________
4. Word Division	________	________
5. Punctuation	________	________
6. Envelope placement	________	________

*Acceptability is mailability

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TYPE BUSINESS LETTER AND ENVELOPE COMPETENCY TEST

Directions: Type and correct the following business letter and envelope from the rough draft.

Please type the following letter to Ms. Samantha T. Abrams, who is the Purchasing Agent for ~~the~~ Royal Secretarial Services, 1502 Hewitt Avenue, Saint Paul, MN Minnesota. The ZIP Code is 55104-3823.

(¶) Your kind remarks ~~comments~~ during our telephone conversation today about my presentation at the Office Products Symposium in Minneapolis last week are ~~very~~ much appreciated. As you requested, I am enclosing ~~sending you~~ a brochure that shows all models of the Sovereign Series of electronic typewriters. The prices listed ~~shown~~ in the brochure are, of course, retail prices. Since you usually ~~customarily~~ purchase items in quantity, you ~~will~~ qualify for a 15-percent discount.

(¶) The Sovereign electronic typewriter is a masterpiece of efficiency. The Model HT-100 is a single-element, self-correcting typewriter ~~machine~~ with dual pitch. Its ~~many~~ features include automatic error correction, six repeat character keys, both vertical and horizontal half-spacing, and automatic tabulation. Secretaries ~~Stenos~~ who have used ~~utilize~~ the Model HT-100 report ~~have found~~ that they can do more work with less effort. ~~than they ever have before.~~

(¶) May we demonstrate the Sovereign typewriter for your secretarial personnel ~~group~~? Call ~~Contact~~ me at 487-5200, Extension 512, and I will be happy ~~glad~~ to set up an appointment for one of our representatives to visit your office.

402 Roy T. Blackwell

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Source: Century 21 Typewriting, South-Western Publishing

COMPETENCY AREA: TYPING

TASK: Type interoffice memoranda

PERFORMANCE OBJECTIVE:

Given a rough draft of an interoffice memorandum, the student will type the memorandum in acceptable form. A checklist will be used to evaluate performance. All items on the checklist must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following page

*Note: Use the same checklist as for letter evaluation omitting the envelope evaluation item.

TYPE INTEROFFICE MEMORANDUM COMPETENCY TEST

Directions: Type the following memorandum on a standard preprinted memorandum form.

[To:] Perry Davis, [From:] Helene Cotter, [Subject:] Room Reservations

Please reserve Room 3004 for me on Tuesday, April 4, from 8:30 a.m. to 12 noon. We will need a slide projector and screen for our meeting. Please make arrangements to have this equipment in the room by 9 a.m.

I would also like to reserve Room 3004 for April 10 from 1:30 p.m. to 3:30 p.m. I will send you my equipment requirements on the 6th.

HC

Source: Typing, Gregg Typing, SEries Seven, Gregg Division/McGraw-Hill

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COMPETENCY AREA: TYPING

TASK: Type and correct tabulated information

PERFORMANCE OBJECTIVE:

Given a rough draft of a table, the student will type and correct the tabulated information in acceptable form. A checklist will be used to evaluate performance. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

TABULATION CHECKLIST

	Acceptable	Unacceptable
1. Table is centered vertically	________	________
2. Main heading is: a. centered horizontally b. in all capitals	________	________
3. Secondary heading is: a. a double space below main heading b. centered horizontally c. capitalized on first letter of main words d. followed by a triple space	________	________
4. Column headings are: a. centered above column entries b. underscored c. capitalized d. followed by a double space	________	________
5. Column entries are: a. centered horizontally using longest item in each column b. separated by appropriate spacing	________	________
6. Information is accurate	________	________
7. Corrections are not obvious	________	________
8. Paper is free of blemishes	________	________

TABULATED INFORMATION COMPETENCY TEST

Directions: Type and correctly format the following table. Center the problem vertically and horizontally on a full sheet of paper. Double space the column entries. Leave 8 spaces between columns.

[*Title*] DEGREE ABBREVIATIONS

[*Subtitle*] Selected From American Universities and Colleges

[*Column headings*] Abbreviation, Title, Classification

[*Line 1*] D.D., Doctor of Divinity, Honorary

[*Line 2*] D.P.A., Doctor of Public Administration, Earned and Honorary

[*Line 3*] D.Sc., Doctor of Science, Earned and Honorary

[*Line 4*] LL.D., Doctor of Laws, Usually Honorary

[*Line 5*] Pharm. D., Doctor of Pharmacy, Earned and Honorary

Source: Typing, Gregg Typing, Series Seven, Gregg Divison/McGraw-Hill

COMPETENCY AREA: TYPING

TASK: Demonstrate problem solving and creativity in establishing headings, boxed information, and capitalization from draft copy

PERFORMANCE OBJECTIVE:

Given draft copy information, the student will demonstrate problem solving and creativity in establishing headings, boxed information, and capitalization. A checklist will be used to evaluate performance. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

PROBLEM SOLVING CHECKLIST

	Acceptable	Unacceptable
1. Placement is pleasing to the eye	________	________
2. Formatting is consistent and logical	________	________
3. Content is accurate	________	________
4. Corrections are neat and not obvious	________	________

PROBLEM SOLVING COMPETENCY TEST

Directions: Use your best judgment and knowledge to type the following report.

About Apples

PICKING APPLES

If you live near apple-growing farms, you can get the very freshest fruit, along with some fresh air and exercise, by going to a pick-your-own orchard. These fruit farms often post signs on roads or run ads in local papers. Call in advance to see if you need to bring baskets and to check on the kinds of apples they grow.

RATING APPLES

Big apples may look solid, but often they are mealy and mushy inside. Small- or medium-sized fruit may taste better. Here are some names of apples and their features to help you get the right kind of apple for your needs.

Northern Spy. This kind of apple is somewhat tart and is best for baking because it holds its shape well when cooked.

Cortland. This apple is somewhat tart, too, but it has a nice crunch. It is best for salads because it won't discolor as fast as some others.

Red and Golden Delicious. Both kinds are good to eat; both kinds are sweet and juicy.

Source: *Typing, Gregg Typing, Series Seven*, Gregg Division/McGraw-Hill

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PROBLEM SOLVING COMPETENCY TEST

Directions: Use your best judgment and knowledge to type the following report.

RESOLUTION

WHEREAS Janice Renée Carlton will retire from the presidency of The Business Club of Wayne High School upon her forthcoming graduatcon from this institution; and

WHEREAS she has devoted all her skill and much of her time to the development, expansion, and services of the Club, to the end that under her leadership the Club has grown both in its contribution to and in its prestige in the said Wayne High School; and

WHEREAS she has proved herself a generous leader, a warm and kindly person, and an associate much endowed with the ability to inspire others; therefore be it

RESOLVED, that the officers and members of The Business Club truly compliment and commend her for her devotion to them in their behalf and do express their deep gratitude to

JANICE RENÉE CARLTON

Source: Typing, Gregg Typing, Series Seven, Gregg Division/McGraw-Hill

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PROBLEM SOLVING COMPETENCY TEST

Directions: Use your best judgment and knowledge to type the following report.

FEAS~~A~~IBILITY OF A FOUR-DAY CLASS WEEK

By (Your name)

There is a trend in the business community twoard a 4-day work week. The idea of a shorter workweek is filtering in to the # educational community. There is ~~certainly~~ definitely a need for Alternatives to the present system of 5 days, which is ~~very~~ becoming costly for all involved.

SELECTION OF THE PARTICIPANTS

5 The researcher cho~~o~~se to delimit the sample to~~o~~ two separate categories: (1) Faculty, Staff, and Students who live on campus; and (2) commuting students who live off ~~the~~ campus.

PURPOSE OF THE STUDY

5 It was the purpose of the study to identify University opinions of a 4-day class week.

FINDINGS OF THE STUDY

One of the maj~~e~~or findings of th~~e~~is study was that 55% of those surveyed wish~~ed~~ to keep the ~~present~~ 5-day class week. The majority of those with this opinoin were Students. Computer students, however, wanted to try the 4-day class week; and Faculty and Staff were also of this opinion. ~~also~~

The most popular option for a four-day class week is for classes to # be conducted on Monday through Thursday, with Friday ~~being~~ reserved as a day when Students could ~~obtain~~ recieve coun~~c~~seling or advisement from the faculty.

Source: Typing, Gregg Typing, Series Seven, Gregg Division/McGraw-Hill

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COMPETENCY AREA: TYPING

TASK: Demonstrate proficiency in typing numbers (and symbols).

PERFORMANCE OBJECTIVE:

Given a two-column table of numbers, the student will demonstrate proficiency in typing numbers. A checklist will be used to evaluate performance. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

NUMBER AND SYMBOL CHECKLIST

	Acceptable	Unacceptable
1. Content is accurate	________	________
2. Corrections are neat and not obvious	________	________

NUMBER PROFICIENCY COMPETENCY TEST

Directions: Set the following material up in a table with two columns; head the table "employee evaluation scores by code number" and use appropriate column headings.

Employee Codes:	34578	62% Scores
	90173	88
	54371	65
	98700	78
	26397	96
	82946	86
	40017	74
	29113	90
	86549	83
	13577	86
	61460	91
	95452	87
	11364	65
	34633	85
	average	80

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SYMBOL COMPETENCY TEST

Directions: Type the following lines once.

1. Carpet remnants were (#10), (#29), (#39), (#49), and (#56).
2. Annette scored 92%. Joe made 83% and Ed had 74%.
3. Do 10 + 29 + 38 + 47 + 56 = 180? Yes! It's 180!
4. Times listed: 10:29, 11:38, 2:37, 1:56, & 2:01.
5. Write dates as April 5, 1983 or 4/5/83 or 4-5-83.
6. When J & R orders it at a 3.6% discount, #1 is $29.00.
7. The signal is "blue" for up and "green" for down.
8. Buy 8   75   and 26   25   ; total (plus 4%) is $13.00.
9. Note the following: 10, * 29, * 38, * 47, * and 56, *.
10. Please send Return of Lassie or Call of the Wild.

COMPETENCY AREA: TYPING

TASK: Demonstrate proofreading skills

PERFORMANCE OBJECTIVE:

Given uncorrected material, the student will demonstrate proofreading skills by using proofreaders marks to correct the materials. A checklist will be used to evaluate performance. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

PROOFREADING SKILLS CHECKLIST

	Acceptable	Unacceptable
1. Locate errors		
2. Use correct proofreader marks		

PROOFREADING SKILLS COMPETENCY TEST

Directions: Using proofreaders marks, correct the following rough draft and type in acceptable form. Make sure that you check everything carefully for correct format and accuracy.

June 32, 19--

Mrs annabel Bowman
435 wilson drive
five wake, wyo 83349

Dear mr.Bowman

You will be please to hear, Mrs. Bowman; that we are issuing to your a credit card with out comp-ny. You will find it to be very useful when making purchases at any of our stores in Wyoming.

If you have any qeustions about how the credit card works,please refer to the book that I have enclosed. If you ahve any morthing else you wish to know about how the card works, please free feel to call me or write to our Service representative, Georqe Washington.

Sincerely Yours,

Barry B. Burger
Credit Manger

CM:urs

WRITTEN/ORAL COMMUNICATION SKILLS

TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
* 1. Locate and record information found in a dictionary and other reference materials.	Required	18	72	17	63	9	38	3	50	8	53
	Desired	6	24	8	30	10	42	3	50	5	33
	Unnecessary	1	4	2	7	5	20	0	0	2	13
* 2. Spell and define words.	Required	21	84	21	78	14	58	3	50	11	73
	Desired	4	16	5	19	8	33	3	50	4	27
	Unnecessary	0	0	1	3	2	8	0	0	0	0
* 3. Find specific information in written material.	Required	17	68	15	56	12	50	4	67	8	53
	Desired	6	24	9	33	9	38	2	33	5	33
	Unnecessary	2	8	3	11	3	12	0	0	2	13
* 4. Write gramatically sound and complete sentences.	Required	22	88	22	82	16	67	2	33	13	87
	Desired	3	12	4	15	8	33	4	67	2	13
	Unnecessary	0	0	1	4	0	0	0	0	0	0
* 5. Write sentences with correct punctuation, capitalization, abbreviations and number.	Required	23	92	22	82	15	62	2	33	13	87
	Desired	2	8	3	11	9	38	4	67	2	13
	Unnecessary	0	0	2	7	0	0	0	0	0	0
* 6. Compose and write simple business letters.	Required	20	80	18	67	16	67	3	50	13	87
	Desired	5	20	7	26	8	33	3	50	2	13
	Unnecessary	0	0	2	7	0	0	0	0	0	0
* 7. Follow oral instructions.	Required	23	92	23	85	24	100	5	83	14	93
	Desired	2	8	4	15	0	0	1	17	1	7
	Unnecessary	0	0	0	0	0	0	0	0	0	0
* 8. Give oral instructions.	Required	13	52	18	67	14	58	4	67	8	53
	Desired	12	48	7	26	7	29	2	33	6	40
	Unnecessary	0	0	2	7	3	13	0	0	1	7
* 9. Demonstrate good listening skills.	Required	24	100	24	89	20	83	4	67	14	93
	Desired	0	0	3	11	4	17	2	33	1	7
	Unnecessary	0	0	0	0	0	0	0	0	0	0
* 10. Greet visitors and give them directions.	Required	20	80	22	79	16	70	3	50	12	80
	Desired	4	16	5	18	5	22	2	33	1	7
	Unnecessary	1	4	1	3	2	8	1	17	0	0

* Objective and test are written for this task.

WRITTEN/ORAL COMMUNICATION CONTINUED

TASK	NEED	SPECIALIZED OFFICE		GENERAL OFFICE		BOOKKEEPING/ ACCOUNTING		COMPUTER RELATED		ALL OTHER	
		#	%	#	%	#	%	#	%	#	%
* 11. Speak clearly and accurately.	Required	23	92	23	85	20	83	3	50	14	93
	Desired	2	8	4	15	4	17	3	50	1	7
	Unnecessary	0	0	0	0	0	0	0	0	0	0
12. Introduce individuals and speakers.	Required	11	44	10	37	8	33	2	33	7	47
	Desired	9	36	8	30	9	38	2	33	2	13
	Unnecessary	5	20	9	33	7	29	2	33	6	40
* 13. Demonstrate legible handwriting.	Required	19	76	24	89	19	79	3	50	13	87
	Desired	5	20	3	11	5	21	3	50	2	13
	Unnecessary	1	4	0	0	0	0	0	0	0	0

* Objective and test are written for this task.

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Locate and record information found in a dictionary

PERFORMANCE OBJECTIVE:

Given a standard dictionary and 20 requests for information that can be found in a standard dictionary, the student will locate and record the information requested in the space provided. At least 16 of the 20 answers must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: The dictionary used for this test was Houghton-Mifflin. If you use a different dictionary, verify that this information can be located in the dictionary you use.

DICTIONARY COMPETENCY TEST

Directions: The following are requests for various information that may be found in the dictionary. Using your dictionary, locate this information and write it in the space provided for each item. At least 16 of the 20 answers must be correct. You will be given 30 minutes to complete this test.

1. Record all information given for Yale University.

2. What are two different uses for the hyphen?

3. What is the abbreviation used in the dictionary for German?

4. What is the meaning of "bubble and squeak"?

5. Record the diacritical marks for philosophy.

6. Philip IV lived during what years?

7. What is Kremlinology?

8. What are the Autumn signs of the Zodiac?

9. What does the abbreviation Ph.D. stand for?

10. Divide the word communicate into syllables.

11. Where is Mazatlan?

12. What part of speech is exuberant?

13. Record one synonym for mantle.

14. Record the diacritical marks for exosmosis.

15. Who was Sir James Paget and when did he live?

16. In metrics, 10 kilometers is equal to how many miles?

17. Approximately how many square miles are there in the Bahamas?

18. What is the definition of recalcitrant?

19. What does the abbreviation ante mean?

20. When is a comma used before the conjuntions and, but, for, or, yet, and nor?

KEY TO TEST ON DICTIONARY

1. Answer may vary according to dictionary used, but the following is one possible answer: Yale University, New Haven, Connecticut, 1701 Private, enrollment of more than 2,000

2. Answer may vary according to dictionary used, but the following is one possible answer: (1) to divide a word at the end of a line; (2) between parts of compound modifier preceding a noun

3. Ger.

4. A dish of cabbage and potatoes and sometimes meat, fried together.

5. fi los'əfē

6. 1268 - 1314

7. The study of the government, foreign policy, etc., of the Soviet Union.

8. Libra, Scorpio, and Sagittarius

9. Doctor of Philosophy

10. com-mu-ni-cate

11. On the Pacific Coast of Mexico, in the State of Sinaloa

12. Adjective

13. cloak or conceal or envelop

14. ek ' sas mo ' sis

15. English surgeon and pathologist, lived 1814-1899

16. 6.21

17. 4,404 square miles

18. (1) Refusing to obey authority, custom, regulation, etc., stubbornly defiant; (2) hard to handle or deal with

19. Before

20. When they join the clauses of a compound sentence

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Spell words

PERFORMANCE OBJECTIVE:

Given 100 business words dictated orally from the 1500 Most-Used Word list, the student must write 70 correctly.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: The tasks spell words and define words objectives use the 1500 Most-Used Word list. Students should be given the list and an assignment each week of the words to be studied and evaluated. This is an on-going process and should be a regular part of instruction.

SPELL WORDS COMPETENCY TEST

Directions: Indicate the proper spelling of each word by writing it.

*The teacher may use any combination of words from the word list to give an oral test. This should be a progressive assignment throughout the year.

S

1500 MOST-USED WORDS

A
Ability
Able
About
Above
Accept
Accepted
Accident
Accordance
According
Accordingly
Account
Accounting
Accounts
Acknowledge
Act
Action
Active
Activities
Activity
Actual
Actually
Add
Added
Addition
Additional
Address
Addressed
Adequate
Administration
Advance
Advantage
Advantages
Advertising
Advice
Advise
Advised
Advising
Affairs
After
Again
Against
Age
Agencies
Agency
Agent
Agents
Ago
Agree
Agreed
Agreement
Agricultural
Ahead
Aid
Air
All
Allow
Almost
Along
Already
Also
Although
Always
Am
Amended
Amendment
Among
Amount
Amounts
An
Analysis
And
Announced
Annual
Another
Answer
Anxious
Any
Anything
Appear
Appears
Application
Applications
Applied
Apply
Appointment
Appreciate
Appreciated
Appreciation
Appropriate
Approval
Approved
Approximately
Are
Area
Areas
Around
Arrange
Arrangement
Arrangements
Arrive
Article
Articles
As
Ask
Asked
Asking
Assist
Assistance
Assistant
Associates
Association
Associations
Assume
Assure
Assured
At
Attached
Attend
Attendance
Attention
Authority
Authorized
Automobile
Available
Average
Aware
Away
Back
Background
Bad
Balance
Bank
Banking
Banks
Base
Based
Basic
Basis
Be
Because
Become
Been
Before
Begin
Beginning
Behalf
Being
Believe
Below
Benefit
Benefits
Best
Better
Between
Beyond
Big
Bill
Billing
Bills
Black
Blank
Board
Bond
Bonds
Book
Booklet
Books
Both
Box
Boxes
Boys
Branch
Bring
Brochure
Brought
Budget
Build
Building
Built
Bulletin
Bureau
Business
But
Buy
Buying
By
Call
Called
Calling
Calls
Came
Campaign
Can
Cancellation
Cannot
Capacity
Capital
Car
Carbon
Card
Cards
Care
Carefully
Carried
Carry
Case
Cases
Cash
Catalog
Cause
Cent
Center
Central
Cents
Certain
Certainly
Certificate
Certified
Chairman
Chance
Change
Changed
Changes
Chapter
Charge
Charged
Charges
Check
Checked
Checking
Checks
Chief
Children
Choice
Church
Circumstances
Cities
Citizens
City
Civil
Claim
Claims
Class
Classes
Clean
Clear
Close
Closed
Club
Code
Collect
Collection
College
Color
Colors
Come
Comes
Coming
Comments
Commerce
Commercial
Commission
Commitment
Committee
Community
Companies
Company
Complete
Completed
Completely
Completion
Concern
Concerned
Concerning
Condition
Conditions
Conference
Confidence
Confirm
Congratulations
Congress
Connection
Consider
Considerable
Consideration
Considered
Construction
Consumer
Contact
Contained
Continue
Continued
Continuing
Contract
Contracts
Contribution
Control
Convenience
Convenient
Convention
Conversation
Cooperate
Cooperation
Cooperative
Copies
Copy
Corporation
Correct
Correspondence
Cost
Costs
Cotton
Could
Council
Country
County
Course
Courses
Court
Cover
Coverage
Covered
Covering
Covers
Credit
Cross
Current
Currently
Customer
Customers
Cut
Daily
Damage
Data
Date
Dated
Dates
Day
Days
Deal
Dealer
Dealers
Death
Decide
Decided
Decision
Defense
Delay
Delivered
Delivery
Demand
Demonstration
Department
Departments
Deposit
Described
Description
Design
Designed
Desire
Desired
Desk
Detail
Detailed
Details
Determine
Determined
Develop
Developed
Development
Did
Difference
Different
Difficult
Dinner
Direct
Directly
Director
Directors
Discount
Discuss
Discussed
Discussion
Display

Distribution
District
Dividend
Division
Do
Doctor
Does
Doing
Dollar
Dollars
Don't
Done
Double
Doubt
Down
Dozen
Drainage
Drive
Drop
Due
Duplicate
During
Duty
Each
Earliest
Early
Earnings
Easily
East
Easy
Economic
Economy
Education
Educational
Effect
Effective
Effort
Efforts
Eight
Either
Election
Electric
Eligible
Else
Emergency
Employee
Employees
Employment
Enable
Enclose
Enclosed
Enclosing
End
Endorsement
Engineering
Enjoy
Enjoyed
Enough
Entire
Entirely
Entitled
Envelope
Equipment
Error
Especially
Established
Estate
Estimated
Even
Evening
Event
Ever
Every
Everyone
Everything
Evidence
Examination
Example
Excellent
Except
Excess

Exchange
Executive
Existing
Expect
Expected
Expense
Expenses
Experience
Experienced
Explain
Explained
Export
Express
Extend
Extended
Extension
Extent
Extra
Extremely
Face
Facilities
Fact
Factory
Facts
Faculty
Fair
Fall
Familiar
Family
Far
Farm
Fast
Favor
Favorable
Feature
Features
Federal
Fee
Feel
Fees
Feet
Felt
Few
Field
Figure
Figures
File
Filed
Files
Filing
Fill
Film
Final
Finance
Financial
Financing
Find
Fine
Finest
Finish
Fire
Firm
Firms
First
Fiscal
Fit
Five
Floor
Folders
Follow
Following
Follows
Food
Foot
For
Force
Foreign
Form
Formal
Forms
Forth

Forward
Forwarded
Found
Four
Fourth
Free
Freight
Friend
Friends
From
Front
Full
Fully
Fund
Funds
Furnish
Furnished
Furniture
Further
Future
Gas
Gave
General
Generally
Get
Getting
Give
Given
Gives
Giving
Glad
Go
Going
Good
Goods
Got
Government
Grade
Graduate
Great
Greater
Greatest
Greatly
Green
Gross
Group
Groups
Growing
Growth
Guarantee
Guide
Had
Half
Hand
Handle
Handled
Handling
Hands
Happy
Hard
Has
Have
Having
He
Head
Health
Hear
Heard
Hearing
Heavy
Held
Help
Helpful
Helping
Her
Here
Herewith
Hesitate
High
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Highway
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History
Hold
Home
Hope
Hospital
Hospitals
Hotel
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Housing
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Ideas
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Increasing
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Individual
Industrial
Industries
Industry
Inform
Information
Informed
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Inspection
Instead
Institute
Institutions
Instructions
Insurance
Insured
Interest
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Invitation
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Lease
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Legislation
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Letter
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Literature
Little
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Living
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Location
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Longer
Look
Looking
Loss
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Machine
Machines
Made
Magazine
Mail
Mailed
Mailing
Main
Maintain
Maintenance
Major
Make

Makes
Making
Man
Management
Manager
Managers
Manner
Manual
Manufacture
Manufacturers
Manufacturing
Many
Market
Marketing
Material
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Membership
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Modern
Money
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Morning
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Necessary
Need
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New
News
Newspaper
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Night
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Nor
Normal
North
Not
Note
Noted
Nothing
Notice
Now
Number
Numbers
Obligation
Obtain
Obtained
Of
Off
Offer
Offered
Offering
Office
Officer
Officers
Offices
Official
Often
Oil
Old
On
Once
One
Only
Open
Operate
Operating
Operation
Operations
Opinion
Opportunities
Opportunity
Or
Order
Ordered
Orders
Organization
Organizations
Original
Other
Others
Otherwise
Our
Out
Outline
Outside
Outstanding
Over
Own
Owner
Owners
Package
Page
Pages
Paid
Paper
Papers
Paragraph
Part
Participate
Participation
Particular
Particularly
Parts
Pass
Passed
Past
Pay
Payable
Paying
Payment
Payments
Payroll
Pays
Peace
People
Per
Percent
Percentage
Performance
Perhaps
Period
Permit
Person
Personal
Personally
Personnel
Persons
Phone
Physical
Picture
Piece
Pieces
Pipe
Place
Placed
Plan
Planning
Plans
Plant
Plastic
Pleasant
Please
Pleased
Pleasure
Plus
Point
Points
Policies
Policy
Portion
Position
Positions
Possibility
Possible
Possibly
Post
Postage
Potential
Pound
Pounds
Power
Practical
Practice
Prefer
Premium,
Premiums,
Preparation
Prepared
Present
Presented
Presently
President
Press
Previous
Previously
Price
Prices
Principal
Printed
Printing
Prior
Private
Privilege
Probably
Problem
Problems
Procedure
Procedures
Proceed
Process
Processing
Produce
Product
Production
Products
Professional
Profit
Profitable
Profits
Program
Programs
Progress
Project
Projects
Promotion
Prompt
Promptly
Proof
Proper
Properly
Property
Proposal
Proposed
Protection
Proud
Prove
Provide
Provided
Provides
Providing
Provisions
Public
Publication
Published
Purchase
Purchased
Purchasing
Purpose
Purposes
Put
Qualified
Quality
Quantity
Quarterly
Question
Questions
Quickly
Quite
Quote
Radio
Range
Rate
Rates
Rather
Reach
Reached
Read
Reading
Ready
Real
Realize
Really
Reason
Reasonable
Reasons
Receipt
Receive
Received
Receiving
Recent
Recently
Recommend
Recommendations
Recommended
Record
Records
Red
Reduced
Refer
Reference
Referred
Regard
Regarding
Regards
Regional
Regret
Regular
Regulation
Regulations
Relations
Relative
Release
Remain
Remember
Rent
Rental
Repair
Replacement
Reply
Report
Reported
Reports
Representative
Representatives
Request
Requested
Requesting
Requests
Require
Required
Requirements
Requires
Research
Reservations
Reserve
Respect
Response
Responsibility
Responsible
Rest
Result
Results
Retail
Return
Returned
Returning
Revenue
Review
Right
Risk
Road
Room
Route
Rules
Run
Running
Safety
Said
Salary
Sale
Sales
Same
Sample
Samples
Satisfactory
Satisfied
Save
Saving
Savings
Say
Schedule
Scheduled
School
Schools
Season
Second
Secretarial
Secretary
Section
Secure
Security
See
Seeing
Seem
Seems
Seen
Select
Selected

Selection
Self
Sell
Selling
Semester
Senate
Send
Sending
Sent
Separate
Series
Serve
Served
Service
Services
Serving
Session
Set
Sets
Seven
Several
Shall
Share
Shares
She
Sheet
Sheets
Ship
Shipment
Shipments
Shipped
Shipping
Shop
Short
Shortly
Should
Show
Showing
Shown
Shows
Side
Sign
Signature
Signed
Similar
Simple
Simply
Since
Sincere
Sincerely
Single
Situation
Six
Size
Sizes
Small
So
Society
Sold
Solution
Some
Something
Somewhat
Soon
Sorry
Sound
Source
South
Southern
Space
Special
Specific
Specifications
Specified
Speed
Spring
Staff
Stand
Standard
Start
State
Stated
Statement
States
Station
Status
Steel
Step
Still
Stock
Stocks
Stop
Storage
Store
Stores
Story
Street
Student
Students
Studies
Study
Style
Subject
Submit
Submitted
Subscription
Substantial
Success
Successful
Such
Sufficient
Sugar
Suggest
Suggested
Suggestion
Suggestions
Summer
Supplies
Supply
Support
Sure
Survey
System
Table
Take
Taken
Taking
Talk
Tax
Taxes
Teacher
Teachers
Teaching
Technical
Telephone
Television
Tell
Temporary
Ten
Term
Terms
Territory
Test
Than
Thank
Thanking
Thanks
That
That's
The
Their
Them
Then
There
Therefore
These
They
Thing
Things
Think
Thinking
Third
Thirty
This
Those
Though
Thought
Thousands
Three
Through
Throughout
Thus
Time
Times
Tire
Title
To
Today
Together
Told
Too
Top
Total
Touch
Toward
Town
Trade
Traffic
Training
Transfer
Transportation
Travel
Treasury
Tremendous
Trial
Trip
Trouble
Truck
Trucks
True
Trust
Try
Trying
Turn
Twelve
Twenty
Two
Type
Types
Typing
Unable
Under
Understand
Understanding
Unfortunately
Union
Unit
United
Units
University
Unless
Until
Up
Upon
Urge
Us
Use
Used
Useful
Using
Usually
Vacation
Valuable
Value
Various
Very
Via
Vice
View
Visit
Volume
Vote
Wage
Want
Wanted
War
Warehouse
Was
Water
Way
Ways
We
We'll
Weather
Week
Weekly
Weeks
Weight
Welcome
Well
Were
West
Western
What
Whatever
When
Where
Whether
Which
While
White
Who
Whole
Whom
Whose
Why
Wide
Will
Willing
Wire
Wish
Wishes
With
Within
Without
Women
Won't
Word
Words
Work
Worked
Workers
Working
Works
World
Worth
Would
Write
Writing
Written
Wrote
Year
Years
Yes
Yet
You
You'll
Young
Your
Yours
Yourself

The 1500 Most-Used Words **are compiled from two doctoral studies: "The Basic Vocabulary of Written Business Communications," by James E. Silverthorn and "An Analytical Comparison of the Relative Word-Combination Frequencies of Business Correspondence with Phrase Frequencies of Selected Shorthand Textbooks," by Devern J. Perry.**

From Word Division Manual by James E. Silverthorn and Devern J. Perry. © 1970 by South-Western Publishing Co. Used with permission of South-Western Publishing Co.

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Define words

PERFORMANCE OBJECTIVE:

Given ten words taken from the 1500 Most-Used Words list, students will define those words. Seven out of 10 must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: The tasks spell words and define words objectives use the 1500 Most-Used Word list. Students should be given the list and an assignment each week of the words to be studied and evaluated. This is an on-going process and should be a regular part of instruction.

DEFINE WORDS COMPETENCY TEST

Directions: Define the following words

*The teacher should provide the words for the test to match the weekly assignment from the 1500 Most-Used Words list.

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Find specific information in written material

PERFORMANCE OBJECTIVE:

Given five paragraphs, the student will find specific information in written material and indicate this information by underlining the topic sentence in each paragraph. Four of the five topic sentences must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

FIND SPECIFIC INFORMATION COMPETENCY TEST

Directions: In the following paragraphs, underline the statement that states the topic of each paragraph.

Postal cards are sometimes used to send brief messages. They are typed in a style similar to the form of a business letter. Usually the address of the person to whom the card is being written is left out to save space, and no space is used between paragraphs. Stamped government postal cards may be purchased from post offices for less than the postage cost of a letter.

When the various branches of the armed forces advertise for recruits, they stress the opportunities for occupational training. These range from radio to medicine. Here, as with on-the-job or apprenticeship training, you can learn and earn at the same time.

Manual dexterity is the ability to work effectively with your hands. It is important in using tools, operating office machines, performing surgery, and assembling and repairing machines and other equipment.

Just as there are many sources of consumer information, there are many sources of occupational information. The Dictionary of Occupational Titles (DOT), published by the United States Department of Labor, describes about 35,000 different occupations.

Usually the biggest expense in connection with a serious illness or injury is hospital care. This explains why the most popular kind of health insurance is hospital expense insurance. It pays part of or all of a policy-holder's hospital costs including medicines and local ambulance service.

KEY TO SPECIFIC INFORMATION TEST

1. Postal cards are sometimes used to send brief messages.

2. armed forces . . . stress the opportunities for occupational training.

3. Manual dexterity is the ability to work effectively with your hands.

4. The Dictionary of Occupational Titles . . . describes about 35,000 different occupations.

5. . . . the biggest expense in connection with a serious illness or injury is hospital care.

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Write grammatically sound and complete sentences

Write sentences with correct punctuation, capitalization, abbreviation, and numbers*

PERFORMANCE OBJECTIVE:

Given a choice of topics from which to write, the student will write a paragraph using grammatically sound and complete sentences with correct punctuation, capitalization, abbreviations, and numbers. Each sentence will include at least one noun or pronoun, one verb, one adverb, and one adjective. The parts of speech will be labeled above the words in each sentence. There should be a minimum of five sentences in the paragraph. At least four of the five sentences must be written and labeled correctly.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: These two tasks have been written into one test.

GRAMMAR AND SENTENCE STRUCTURE COMPETENCY TEST

Directions: Write a paragraph of at least five sentences that is grammatically sound using complete sentences and correct punctuation, capitalization, abbreviations, and numbers. Each sentence must include one noun or pronoun, one verb, one adverb, and one adjective. Label the parts of speech above the words.

You may choose one of the following topics or use a topic of your own choice.

1. Last night's basketball (etc.) game
2. Your feelings on the MX missile
3. What would you consider a dream vacation
4. What are your plans for the future (ten years from today)
5. What do you see out the window

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Compose and write simple business letters

PERFORMANCE OBJECTIVE:

Given a role-playing situation that requires a letter of response, the student will compose and write a simple business letter. A checklist will be used to evaluate performance. At least 7 of the 10 items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

*Note: Two checklists are provided. One specifically evaluates this role-playing situation. The other is a general evaluation that applies to any business letter.

WRITE SIMPLE BUSINESS LETTER COMPETENCY TEST

You are an employee of the McCann Company; your supervisor is James Cross. You have the responsibility for handling the upcoming workshop. You received a reservation and a $50 check for the Data Processing Workshop. The workshop is filled, and you cannot accept any further reservations. Write Ms. Barbara Haroldson returning her check and telling her that the Data Processing Workshop is completely filled. The next workshop will be offered August 10.

CHECKLIST FOR PAGE 19 SIMULATION

	Acceptable	Unacceptable
1. Thanked her for interest in the workshop		
2. Returned the check		
3. Spelled names correctly		
4. Stipulated date of next workshop		
5. Inserted new application		

QUALITIES OF EFFECTIVE BUSINESS LETTER CHECKLIST

	Acceptable	Unacceptable
1. Creates a favorable first impression	________	________
a. quality of stationery is good		
b. letterhead is attractive		
c. typing is neat		
d. letter style is correct		
e. letter is properly placed on page		
2. Appeals to reader's point of view (Reader can answer Yes to at least one of these statements)	________	________
a. What do I get out of this?		
b. What will it do for me?		
3. Correct in every detail	________	________
a. typed without strikeovers and without spacing errors		
b. all word spelled correctly		
c. sentences are grammatically correct		
4. Courteous, friendly and sincere	________	________
a. conveys friendliness, warmth, and sincerity		
5. Promotes goodwill (Can answer Yes to at least one of these statements)	________	________
a. conveys favorable impression of business		
b. reply was written promptly		
6. Clear and complete	________	________
a. all important information included		
7. Concise	________	________
a. covers subject in the fewest words possible		
8. Flows smoothly	________	________
a. smooth transition from sentence to sentence		
b. smooth transition from paragraph to paragraph		
9. Well paragraphed	________	________
a. one main idea to a paragraph		
b. six to eight typewritten lines to a paragraph		
c. no more than three to five paragraphs		
10. Avoids jargon	________	________
a. use words commonly understood by all		

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Follow oral instructions

PERFORMANCE OBJECTIVE:

Given a role-playing situation requiring the following of oral instructions, the student will follow the oral instructions. A checklist will be used to evaluate performance. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

FOLLOW ORAL INSTRUCTION COMPETENCY TEST

Directions: Mrs. Ruth Stewart, training manager, asked you to study the registration list from yesterday's Time Management Seminar sponsored by the Training Department. She wants to know what type of employees are attending the seminar--their addresses, telephone numbers, and their qualifications. Mrs. Stewart wants three copies of the information prepared; return the original to her, send a copy to your supervisor, and place the third copy in your file.

The teacher should state this information to the student orally. The checklist is provided on the next page.

ORAL INSTRUCTIONS CHECKLIST

	Acceptable	Unacceptable
1. Listened attentively		
2. Asked relevant questions		
3. Made necessary notes		
4. Carried out instructions in the correct order* a. listed type of employees b. listed addresses, telephone numbers, and qualifications c. prepared three copies d. returned original to Training Manager e. sent copy to supervisor f. placed third copy in file		
5. Followed instructions cheerfully		

All items must receive acceptable ratings.

*Note: Depending on the role-playing situation, this part of the checklist must be adapted to specifics required.

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Give oral instructions

PERFORMANCE OBJECTIVE:

Given a list of simple tasks, the student will choose 1 task and 5 oral instructions to a fellow student on how to perform that task. A checklist will be used for evaluation. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

GIVE ORAL INSTRUCTIONS CHECKLIST

	Acceptable	Unacceptable
1. Tactful	________	________
2. Precise	________	________
3. Spoken clearly	________	________
4. Grammatically correct	________	________
5. Understandable	________	________
6. Non-verbal body expression appropriate	________	________
7. Complete	________	________

*All items must be acceptable.

GIVE ORAL INSTRUCTIONS COMPETENCY TEST

Directions: Choose one task from the list given below. Orally explain to a fellow student how to complete the task.

1. Grip a golf club
2. Separate an egg
3. Tie a necktie
4. Use a manual can opener
5. Make a book cover
6. Repair a broken cassette tape
7. Wrap a present
8. Write a check
9. Open a combination lock
10. A dance step

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Demonstrate good listening skills

PERFORMANCE OBJECTIVE:

Given a hypothetical office situation, the student will demonstrate good listening skills by listening and writing a list of duties to be completed. 8 of the 10 duties must be correct.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages.

LISTENING SKILLS COMPETENCY TEST

Directions: Read the following skit to the class or play a prepared tape. Students should listen for instructions to be completed.

TEACHER: Hello, Mr.__________, I'm Mrs.______________, your department supervisor. I understand you will be working with us as a postal clerk. I'm sure you will enjoy this position. It will allow you to become familiar with our company, the employees, and their position in our company.

STUDENT: Does the postal clerk deliver mail to the individual offices?

TEACHER: Yes, at approximately 8:30 a.m. and 1:30 p.m. daily. Run all envelopes through the letter opener except the president's mail and those items marked CONFIDENTIAL. We are very proud that we have a local post office branch adjacent to our business.

We begin work at 8 a.m. with an hour lunch from 12 to 1. Our work day is complete at 5 p.m.

Your duties will include learning the regional groupings of states, cities, and ZIP codes. You must sort mail rapidly and accurately. Some sorting is done by hand and some by machine. We will ask you to attend two hours of classroom instruction once a week in the evening so we may help you learn these duties. You will often work under tension due to the strain of meeting mailing deadlines. Sometimes you may be asked to carry heavy mail sacks from the loading dock. Our company has a limited number of packages but you will wrap, weigh, and put correct postage on all packages. You will also determine the fastest, most economical carrier.

STUDENT: Is there a large amount of incoming packages?

TEACHER: No, about four packages a day. Pleae do not unwrap packages and deliver them as soon as possible.

STUDENT: Do I need to pick up mail in the office?

TEACHER: Yes, about 3:30 p.m. begin gathering the mail from the trays on each desk. This should give you time to process the mail before the truck arrives at 4:45 p.m. Make sure all mail is processed before leaving. This may require some overtime during peak mailing periods such as Christmas.

Let's go meet Miss Pine who will be working with you.

KEY TO LISTENING TEST

1. Deliver mail
2. Learn the regional groupings of states, cities, and Zip codes
3. Sort mail
4. Attend classroom instruction
5. Carry heavy mail
6. Wrap, weigh, and attach postage to packages
7. Deliver packages as soon as possible
8. Pick up the mail
9. Process the mail
10. Work overtime if necessary

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Greet visitors and give them directions

PERFORMANCE OBJECTIVE:

Given a role-playing situation requiring the meeting of visitors in a business office and directing them to other locations, the student will greet visitors and give them directions. A checklist will be used to evaluate performance. All items must be acceptable.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

GREET VISITORS COMPETENCY TEST

Directions: As receptionist for Mr. Audrey, you greet all visitors coming into the office and help them in any way you can. Mrs. Powers enters the reception area and asks for the office of Helen Barry, an assistant to Mr. Audrey, whose office is in another wing. Give Mrs. Powers simple, but accurate directions. (You should use familiar surroundings, such as your facilities, to create a realistic situation).

GREET VISITORS AND GIVE DIRECTIONS CHECKLIST

	Acceptable	Unacceptable
1. Greeted visitors pleasantly		
2. Used visitors' names where appropriate		
3. Used suitable business vocabulary		
4. Used friendly tone of voice		
5. Showed interest in the visitors and the situation		
6. Gave clear directions		

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Speak clearly and accurately

PERFORMANCE OBJECTIVE:

Given a list of topics from which to choose one topic for an oral report, the student will speak clearly and accurately. A checklist will be used to evaluate performance. All items on the checklist must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages

TOPICS FOR SPEAK CLEARLY AND ACCURATELY COMPETENCY TEST

1. Word processing operator
2. Word processing trainer
3. Proofreader
4. Information processing manager
5. Information processing director
6. Staff analyst
7. Consultant

SPEAK CLEARLY AND ACCURATELY CHECKLIST

	Acceptable	Unacceptable
1. Voice Quality	__________	__________
a. volume		
b. tone		
c. tempo		
d. inflections		
2. Articulation	__________	__________
a. enunciation		
b. pronunciation		
3. Fluency	__________	__________
a. word choice		
b. appropriateness		
c. correctness		
d. vocabulary		

COMPETENCY AREA: WRITTEN AND ORAL COMMUNICATION

TASK: Demonstrate legible handwriting

PERFORMANCE OBJECTIVE:

Given a situation, the student will demonstrate legible handwriting by completing forms. A checklist will be used for evaluation. All items must receive an acceptable rating.

SAMPLE EVALUATION INSTRUMENT OR CHECKLIST: See the following pages.

CHECKLIST

	Acceptable	Unacceptable
Proper sitting position feet flat on floor body straight eyes 12-14 inches from paper fingers rest naturally on paper		
Writing instrument position proper finger position wrist straight proper pressure of fingers		
Uniform slant, spacing, and size		
Proper speed in writing no racing, dragging, drawing		
Numbers are clear, written rapidly, written in space provided		

Using the current date, write the following telephone messages for Ms. Fukumoto:

Marilyn Jones of Office Help Company called at 9:33 a.m.

Her telephone number is 831-0997, Ext. 72. Please call her back.

Ms. Jones wants to know if you have evaluated the performance of Sally Garcia who was assigned to your office last week?

To ____________________

Date ____________ Time ________

WHILE YOU WERE OUT

____

of ____________________

Telephone No. ____________ Ext. ______

☐	TELEPHONED	PLEASE CALL BACK	☐
☐	CALLED TO SEE YOU	WILL CALL AGAIN	☐
☐	RETURNED YOUR CALL	URGENT	☐

Message ____________________

____

____

____

____

____

Received Call

To ____________________

Date ____________ Time ________

WHILE YOU WERE OUT

____

of ____________________

Telephone No. ____________ Ext. ______

☐	TELEPHONED	PLEASE CALL BACK	☐
☐	CALLED TO SEE YOU	WILL CALL AGAIN	☐
☐	RETURNED YOUR CALL	URGENT	☐

Message ____________________

____

____

____

____

____

Received Call

Santiago Martinez of the Credit Department called at 9:10 a.m.

His extension is 6657. Please call him back.

He needs additional information about the credit arrangements which were made with the Flower Basket Floral Co. in Indianapolis.

Source: South-western Publishing
Applied Penmanship, 3rd Ed.

Fill in the following information on the calendar form below.

8:30 a.m.—Call John Harris re meeting tomorrow.

9:00 a.m.—Board of Directors Meeting scheduled for two hours in Room 1700.

11:30 a.m.—Luncheon at Chamber of Commerce, Education Committee Meeting.

1:00 p.m.—Martha Spadara of the Telephone Co.

1:30 p.m.—Request corrected printout from computer department.

2:00 p.m.—Interview Harry Feinstein.

2:30 p.m.—Meet with General Manager in her office.

3:30 p.m.—Staff meeting in Conference Room.

4:30 p.m.—Arrange for trip to San Francisco.

BEST COPY AVAILABLE

MONDAY
JUNE, 1976 **21**

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Source: South-western Publishing, Applied Reprographics, 3rd Ed.